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# **Individuals Authorized Access to the CMS Computer Services**

## **(IACS) User Guide**

### **Attachment F – Individual Practitioner**

**September 2008**

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## Important Note

This User Guide Attachment F and registration as an Individual Practitioner is intended for use by those Individual Practitioners who wish to register as ***sole providers***, i.e., only one IACS user in your practice will register to access CMS Provider applications integrated with IACS.

If your Organization expects to register more than one IACS user to access CMS Provider applications integrated with IACS, please refer to the ***IACS User Guide Attachment G*** and related ***Provider/Supplier Quick Reference Guides*** for your IACS registration and Account Management information and instructions.

## Important Note, continued

The following definitions and organizational rules provide information and guidelines for Individual Practitioners wishing to register in the CMS **Provider/Supplier** User Community

- **Provider/Supplier Community** – This is the community for physicians, non-physician practitioners, institutional providers and suppliers, or representatives of one of those entities.
- **Fiscal Intermediary (FI) /Carrier / Medicare Administrative Contractor (MAC) Community** – Members of this community are employed directly or indirectly by a Fiscal Intermediary (FI), Carrier, or Medicare Administrative Contractor (MAC) as users of systems housed at an Enterprise Data Center (EDC).
- **Individual Practitioner** – This user is a physician or non-physician practitioner.
  - Any user requesting the role of **Individual Practitioner** must be verified as an enrolled Medicare Supplier within 180 days of registering in IACS.
  - Any user who has requested the role of **Individual Practitioner** may request an **additional role**, such as End User or User Group Administrator, in an Organization or User Group any time after receiving his or her IACS User ID. The request for an additional role must be approved by an authorized approver **before the user** can make changes to their account profile that impact this additional role (such as requesting access to additional CMS Applications).
  - If a user's **Individual Practitioner** verification as an enrolled Medicare Supplier **does not take place** within 180 days **and**:
    1. They have **not been approved** for another role in an Organization or User Group, their **Individual Practitioner** access in IACS will be disabled and any access to applications associated with that role will be removed.
    2. They **have been approved for another role** in an Organization or User Group, their IACS account will remain active to allow them to fulfill their Organization or User Group role (including access to applications required and approved for their additional role). However, their **Individual Practitioner** access in IACS will be disabled and any access to applications associated with that role will be removed.

## **F 1.0 Introduction**

### **F 1.1 Purpose**

This **IACS User Guide Attachment F** describes the procedures for registering and provisioning individual practitioners using the Individuals Authorized Access to CMS Computer Services, IACS, application within the Centers for Medicare & Medicaid Services, CMS, and making modifications to their IACS account profile after approval and provisioning.

### **F 1.2 Background**

One of CMS' strategic goals is to streamline its information technology environment so that existing and new systems can effectively share information. This will allow CMS to be more responsive to the demands of changing business needs and take advantage of emerging technologies. CMS plans to make its data more readily accessible to beneficiaries, partners, and stakeholders in a secure, efficient, and carefully planned manner.

In striving to meet these goals, CMS has established a target enterprise architecture and modernization strategy that is based on several key design principles:

- An established, secure Internet architecture for the CMS enterprise
- Defined products for the target enterprise architecture
- Defined security classifications and controls for CMS applications
- Defined security services that support the architecture and implement the controls
- Prescriptive application development standards and guidelines for the target environment

Registering and provisioning users for the IACS system is fundamental to the design and implementation of business applications/systems planned for the CMS target enterprise architecture.

### **F 1.3 How to Use this User Guide**

This **IACS User Guide Attachment F** provides screens and procedures to guide you through common IACS procedures such as:

- Accessing the New User Registration screens
- Completing the User Information and Contact information portion of the New User Registration screen
- Accepting or Declining the Privacy Act Terms and Conditions
- Completing the Registration process
- Logging into IACS for the first time
- Changing passwords
- Password reset when a user has forgotten their password
- User ID recall when a user has forgotten their User ID



- Requesting access to multiple applications integrated with IACS.

Additional screens and procedures that are particular to specific applications or user communities accessed through IACS are provided in accompanying IACS help document **Attachments** and **Quick Reference Guides**. They include such things as:

- Completing the Required Access portion of the New User Registration screen for other roles
- Modifying registration details for these roles after initial approval and provisioning.

#### F 1.4 *Formatting Conventions*

Wherever possible, the following formatting conventions have been used in all IACS help documents.

1. When an action is required on the part of the reader, it is indicated by a line beginning with the word **Action:**

Example:

**Action:** Select the **OK** button.

2. References to portions of screens displayed, and hyperlinks or buttons to be acted upon are indicated in ***bold italics*** in the **Action** statement.

Examples:

All available applications are listed in the ***New User Registration Menu for CMS Applications*** portion of the menu screen

Or

Select the ***Account Management*** hyperlink at the top of the screen.

Or

Select the ***Next*** button to continue.

3. Input fields are indicated in *plain italics*.

Example:

Enter your last name in the *Last Name* field.

4. Required input fields are indicated by an asterisk to the right of the field. These fields must be completed.
5. If you need help on completing an input field, some fields have help icons, to their left. This icon is displayed as a graphic: a small blue letter I inside a white box.
  - a. If you select this icon, a small information window opens overlaying the screen you are working on. This information window provides details about

the input field, such as the type of information being requested, the format in which to enter the data, or a definition of the field.

6. Screen names are indicated in **plain bold**.

Example:

The **CMS Applications Portal Introduction** screen will display as illustrated in Figure 100.

### **F 1.5 Additional IACS Help Documents**

This **IACS User Guide Attachment F** and other IACS help document **Attachments** and **Quick Reference Guides**, include information regarding new and/or modified IACS screens and functionalities up to and including Software Release 4.4.6, September 2008.

**Note:** All IACS help documents and computer-based training units discussed are also available in accessible, 508 compliant, versions.

Some highlights are:

- The IACS **Computer-Based Training, CBT**, menu has been expanded and new menu screens added as discussed in Section F 7.3. These new menu screens illustrate the CBT units that will shortly be made available. All CBT units are developed to walk users through a representative example of the process described and illustrate how to complete IACS tasks such as New User Registration, First Time Login, Modify Account Profile, etc.
- New user registration has been facilitated with the addition of the **New User Registration Menu** screen for CMS User Communities and Applications. When a new user selects the New User Registration hyperlink on the **Account Management** screen, this new menu screen will allow the user to select their desired user community or application prior to entering the IACS **New User Registration** screen.
- The **Account Management** screen contains a hyperlink to the **Forgot My User ID?** functionality. Currently, this functionality is only available to those IACS users who enter a Date of Birth during their IACS registration process.

Attachments have been added to the IACS help documentation to provide additional information and instructions for IACS users.

- **User Guide Main Body** – has been updated to include generic IACS functions for all roles.
- **Attachment A. – MA/MA-PD/PDP/CC** – Medicare Advantage/Medicare Advantage-Prescription Drug/Prescription Drug Plan/Cost Contracts – has been added for additional information on all roles and modifications to IACS account profiles.

## IACS User Guide Attachment F

- **Attachment B – CBO/CSR** – Community Based Organization/Customer Service Representative – has been added for additional information on all roles and modifications to IACS account profiles.
- **Attachment C – COB** – Coordination of Benefits – has been added for additional information on all roles and modifications to IACS account profiles.
- **Attachment D – HETS UI** – HIPPA Eligibility Transaction System User Interface – has been added for additional information on all roles and modifications to IACS profiles.
- **Attachment E – DMEPOS Community** – Durable Medical Equipment, Prosthetics, Orthotics & Supplies (DMEPOS) Competitive Bidding System (DBidS) Community and Application – has been added for all roles of this community and modifications to their IACS account profiles.
- **Attachment F – Provider/Supplier – Individual Practitioner** – has been added for Individual Practitioners.
- **Attachment G – Provider/Supplier and FI/Carrier/MAC Communities** – has been added for all roles of these communities and modifications to their IACS account profiles.

Existing Quick Reference Guides have been updated and new Quick Reference Guides have been added to the IACS help documentation. A current listing of the available Quick Reference Guides follows below:

For all CMS Applications and User Communities:

- **IACS Approver**

For Provider/Supplier and FI Carrier/MAC User Communities:

- **IACS New User Registration – Security Official**
- **IACS New User Registration – Backup Security Official**
- **IACS New User Registration – User Group Administrator**
- **IACS New User Registration – End User**
- **IACS New User Registration – Individual Practitioner**
- **IACS Request Access to a CMS Application – for Individual Practitioners, Organization Users, and Surrogate Users**

For the DMEPOS/DBidS – Durable Medical Equipment, Prosthetics, Orthotics & Supplies Competitive Bidding System (DBidS) Community and Application CMS User Community:

- **IACS New User Registration – DMEPOS Authorized Official**

- **IACS New User Registration – DMEPOS Backup Authorized Official**
- **IACS New User Registration – DMEPOS End User**

**F 1.6 *IACS Screen Information***

Every effort has been made to keep the screen shots in this document up to date; however, there may be minor differences between on-screen text and what is shown in the figures in this User Guide Attachment. These differences should not affect your ability to request desired accesses or perform desired activities.

## F 2.0 IACS Registration

The following subsections provide step by step instructions on how to apply for an IACS user account using the IACS New User Registration procedures.

Once you have an IACS user account, you can use IACS to modify your account profile to request access to various CMS Applications integrated with IACS and available to the Provider/Supplier & FI/Carrier/MAC Communities and/or request access to additional CMS User Communities.

### F 2.1 Accessing IACS New User Registration

The following steps and screens show you how to begin your new user registration in IACS.

**Action:** Browse to <https://applications.cms.hhs.gov> on the CMS website.

The **CMS Applications Portal WARNING/REMINDER** screen will display as illustrated in Figure F 1.



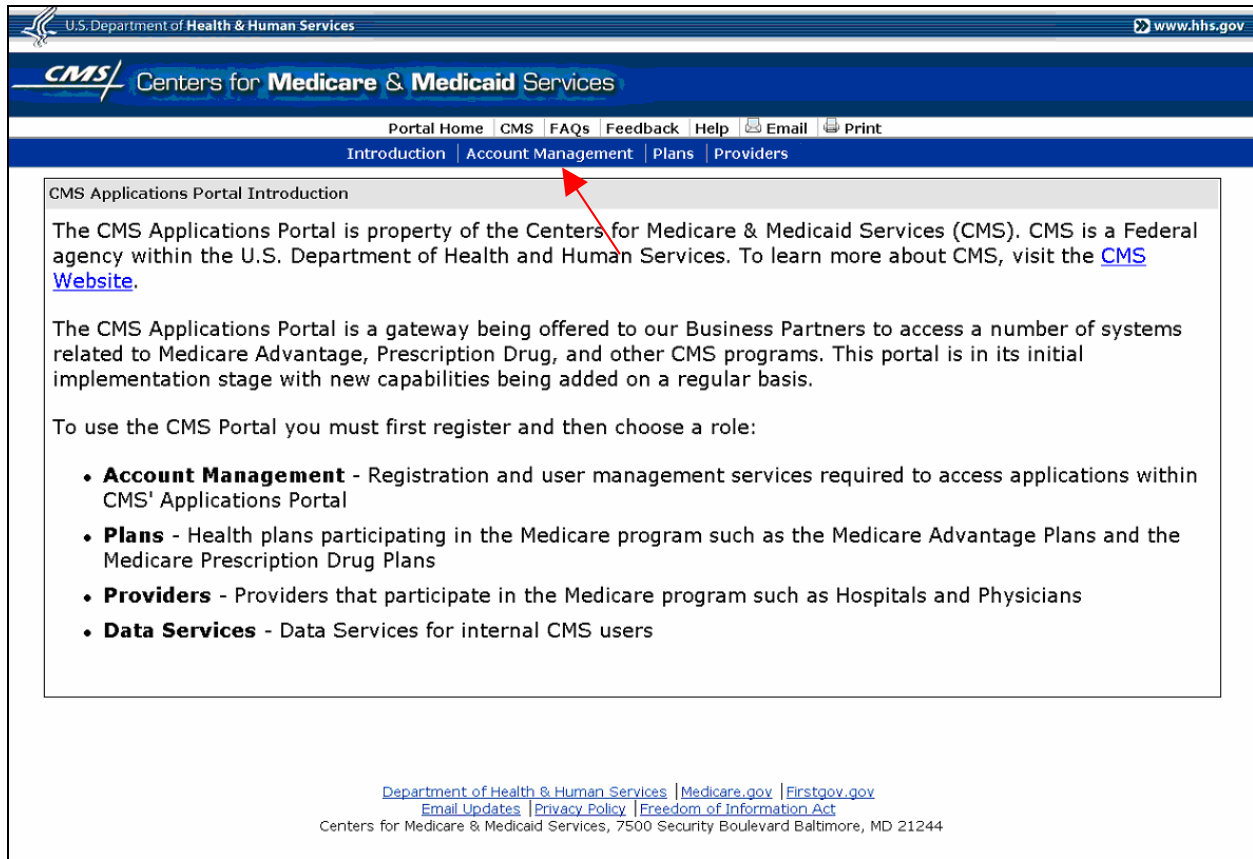
Figure F 1: CMS Applications Portal WARNING/REMINDER Screen

**Action:** Read the important information on this screen and indicate your agreement by selecting the **Enter CMS Applications Portal** button.

If you do not want to proceed any further and you want to exit, select the **Leave** button.

The **CMS Applications Portal Introduction** screen will display as illustrated in Figure F 2.

## IACS User Guide Attachment F



**Figure F 2: CMS Applications Portal Introduction Screen**

**Action:** Select the **Account Management** hyperlink in the menu bar towards the top of the screen.

The **Account Management** screen will display as illustrated in Figure F 3.

Hyperlinks on this screen will allow users to access IACS registration, login functions, and the IACS Community Administration Interface.

The bottom portion of the screen provides Help Resources with Help Desk contact information and email hyperlinks.

## IACS User Guide Attachment F

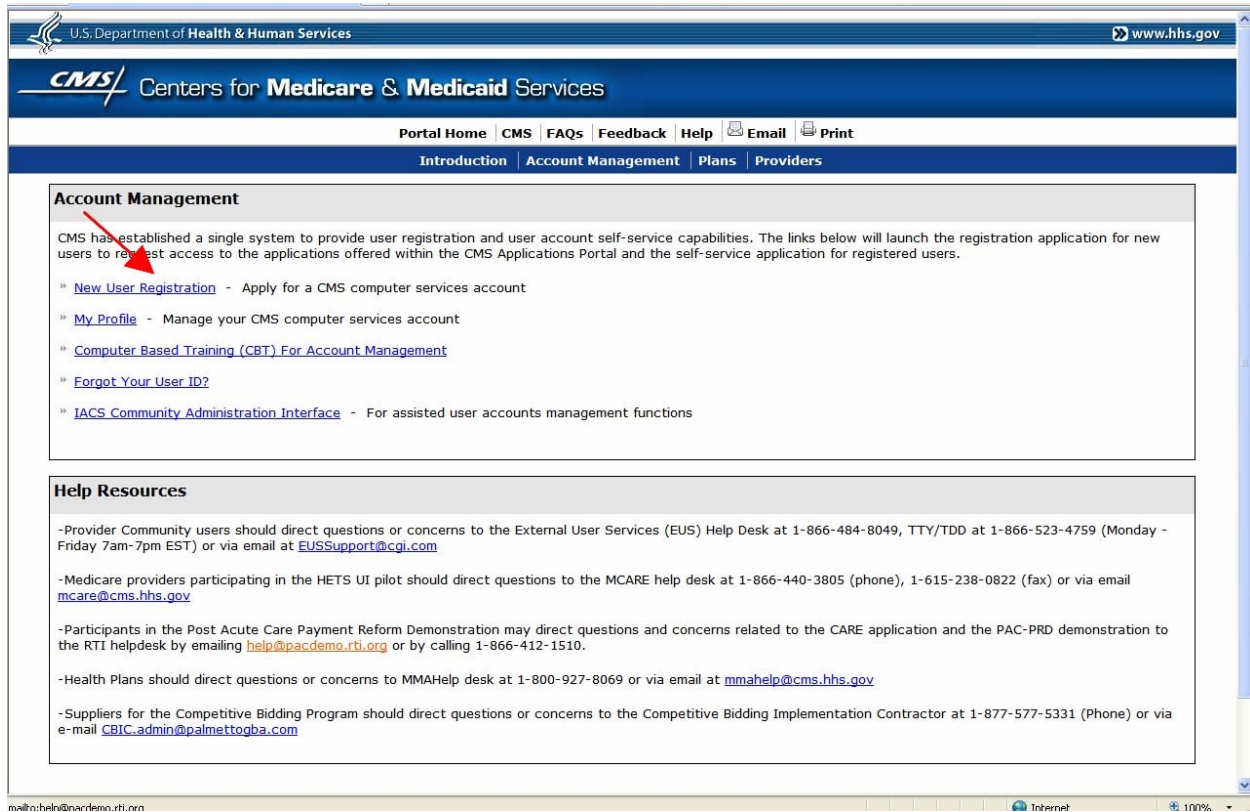
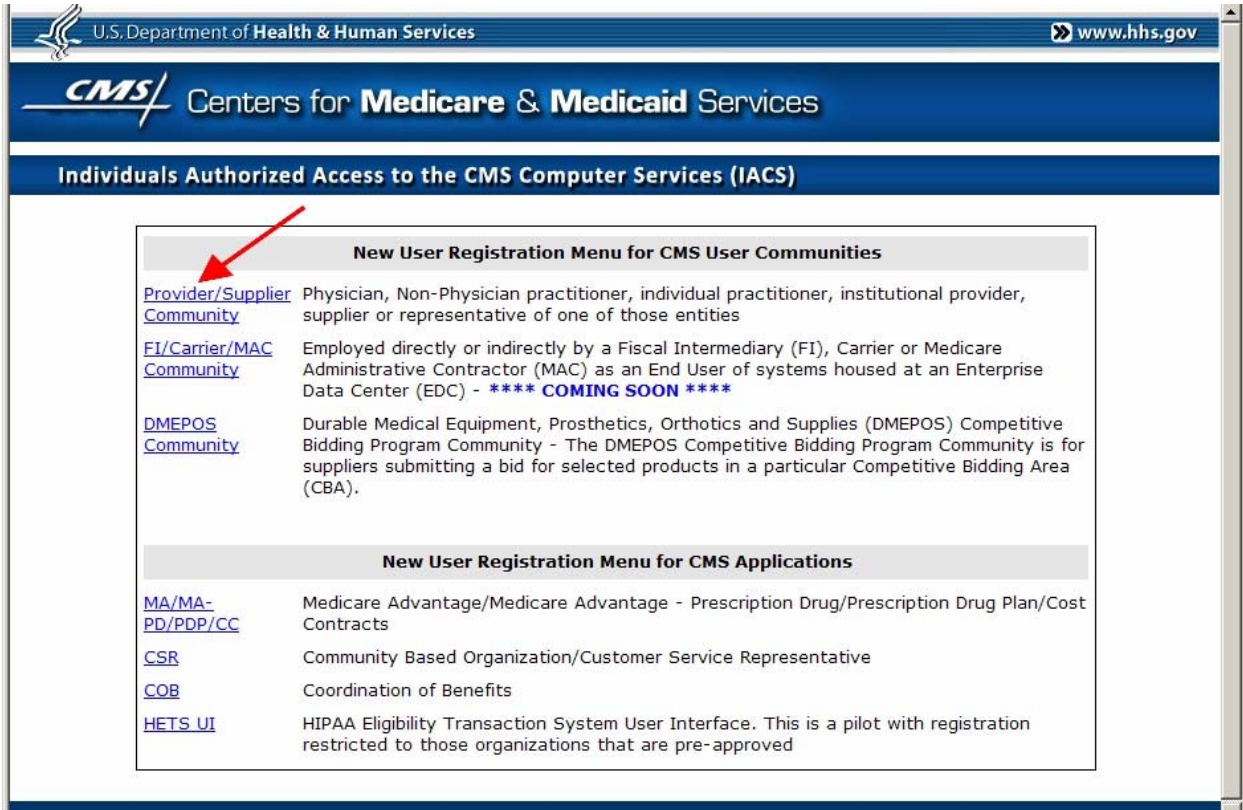


Figure F 3: Account Management Screen

**Action:** Select the ***New User Registration*** hyperlink.

The **New User Registration Menu** screen will display as illustrated in Figure F 4.

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**Figure F 4: IACS New User Registration Menu Screen**

**Action:** Select the ***Provider/Supplier Community*** hyperlink.

A **Terms and Conditions** screen will display as illustrated in Figure F 5.



U.S. Department of Health & Human Services

www.hhs.gov

**CMS** Centers for Medicare & Medicaid Services

LOGOUT HELP

**Individuals Authorized Access to the CMS Computer Services (IACS)**

**Terms and Conditions**

If you want to print the text on this screen, select the **Print** icon to the right of the text **before** taking any other action on the screen.

To skip printing and continue with your registration, read the text, select the **I Accept the above Terms and Conditions** box, and then the **I Accept** button at the bottom of this screen.

**CMS Computer Systems Security Requirements**

**PRIVACY ACT STATEMENT**

The information on the web form is collected and maintained under the authority of Title 5 U.S. Code, Section 552a(e) (10) (The Privacy Act of 1974). This information is used for assigning, controlling, tracking, and reporting authorized access to and use of CMS's computerized information and resources. The Privacy Act prohibits disclosure of information from records protected by the statute, except in limited circumstances.

The information you furnished on this web form will be maintained in the Individuals Authorized Access to the Centers for Medicare & Medicaid Services (CMS) Data Center Systems of Records and may be disclosed as a routine use disclosure under the routine uses established for this system as published at 59 FED. REG. 41329 (08-11-94) and as CMS may establish in the future by publication in the Federal Register.

To continue, you must accept the terms and conditions. If you decline, your registration will automatically be cancelled.

☐ I Accept the above Terms and Conditions

**I Accept** **I Decline**

**Move down**

**Figure F 5: Terms and Conditions – Privacy Act Statement Screen**

**Action:** Read all of the **Privacy Act Statement** by moving down as needed through all of the text.

**Action:** Select the **Print** icon to the right of the text if you want to print this information.

**Action:** Select the **I Accept the above Terms and Conditions** box.

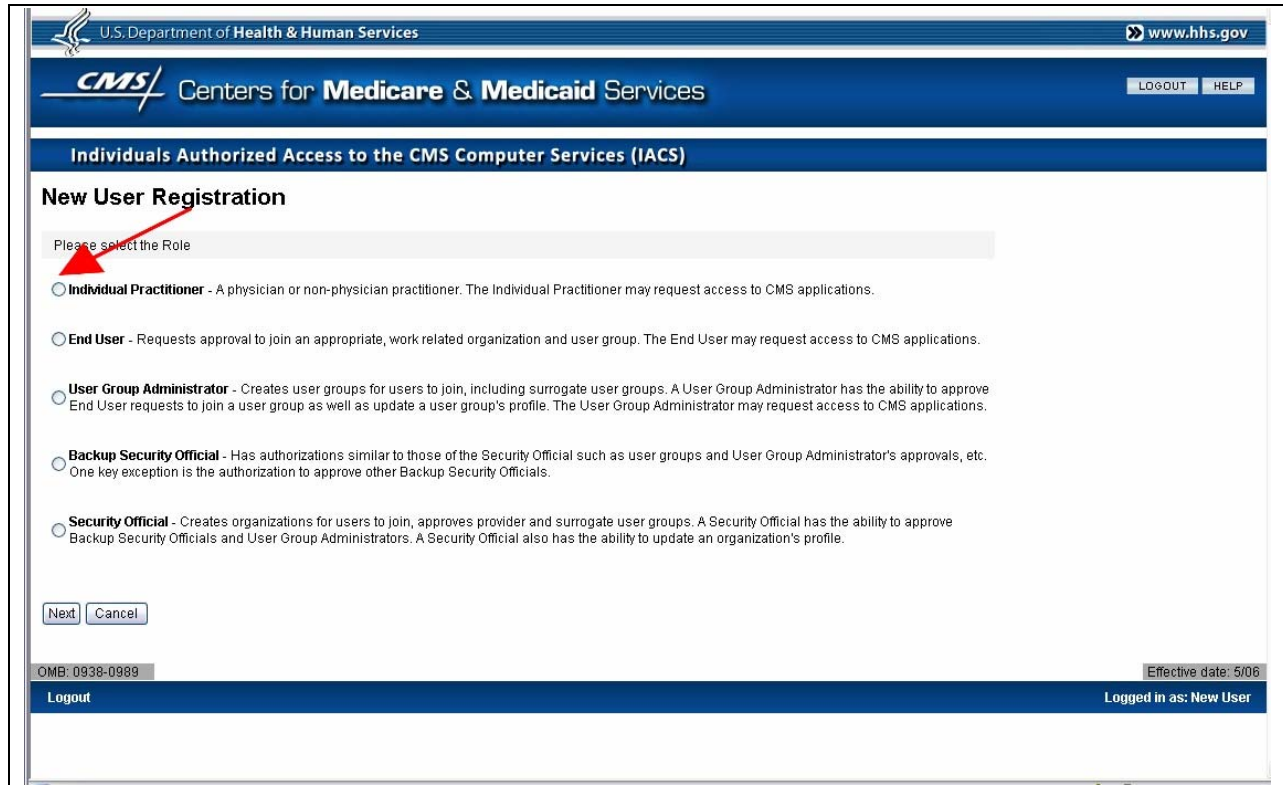
**Action:** Select the **I Accept** button.

**Note:** If you select **I Decline**, a small window will appear for you to confirm your decision to decline. If you confirm your decision, your New User Registration session is cancelled and a screen indicating this is displayed. You must select the **OK** button to exit that screen. The system will then return you to the **CMS Applications Portal Introduction** screen.

When you select the **I Accept the above Terms and Conditions** box and the **I Accept** button in the **Terms and Conditions** screen, the system will display a **New User Registration, Role Selection** screen as illustrated in the example in Figure F 6.

## F 2.2 New User Registration - Individual Practitioner Role Selection

On the **New User Registration, Role Selection** screen users will be able to select their desired role.



U.S. Department of Health & Human Services [www.hhs.gov](http://www.hhs.gov)

**CMS** Centers for **Medicare & Medicaid** Services [LOGOUT](#) [HELP](#)

**Individuals Authorized Access to the CMS Computer Services (IACS)**

**New User Registration**

Please select the Role

☒ **Individual Practitioner** - A physician or non-physician practitioner. The Individual Practitioner may request access to CMS applications.

☐ **End User** - Requests approval to join an appropriate, work related organization and user group. The End User may request access to CMS applications.

☐ **User Group Administrator** - Creates user groups for users to join, including surrogate user groups. A User Group Administrator has the ability to approve End User requests to join a user group as well as update a user group's profile. The User Group Administrator may request access to CMS applications.

☐ **Backup Security Official** - Has authorizations similar to those of the Security Official such as user groups and User Group Administrator's approvals, etc. One key exception is the authorization to approve other Backup Security Officials.

☐ **Security Official** - Creates organizations for users to join, approves provider and surrogate user groups. A Security Official has the ability to approve Backup Security Officials and User Group Administrators. A Security Official also has the ability to update an organization's profile.

[Next](#) [Cancel](#)

OMB: 0938-0989 Effective date: 5/06

[Logout](#) Logged in as: New User

**Figure F 6: New User Registration - Role Selection Screen**

**Action:** Select the radio button to the left of the **Individual Practitioner** role.

**Action:** Select the **Next** button.

A role-specific **Terms and Conditions** screen will display as illustrated in Figure F 7. This screen presents the terms and conditions for the Individual Practitioner role that you have selected. You must accept the terms and conditions for that role in order to proceed with the registration process.

U.S. Department of Health & Human Services

www.hhs.gov

**CMS** Centers for Medicare & Medicaid Services

LOGOUT HELP

**Individuals Authorized Access to the CMS Computer Services (IACS)**

**Individual Practitioner - Terms and Conditions**

If you want to print the text on this screen, select the **Print** icon to the right of the text **before** taking any other action on the screen.

To skip printing and continue with your registration, read the text, select the **I Accept the above Terms and Conditions** box, and then the **I Accept** button at the bottom of this screen.

For purposes of IACS, an Individual Practitioner is a physician or a non-physician practitioner who:

- ☐ will use IACS personally, and
- ☐ will not have employees who will use IACS.

A physician or non-physician practitioner and their staff using IACS must register as a provider organization in IACS. For more information go to <http://www.cms.hhs.gov/MLNMattersArticles/downloads/SE0747.pdf> on the CMS website.

A user requesting the role of Individual Practitioner will be issued a temporary IACS account to use until he/she is verified as an enrolled Medicare Supplier. If a provider registers in IACS in order to enroll via the web, this should provide time to complete the enrollment process.

To continue, you must accept the terms and conditions. If you decline, your registration will automatically be cancelled.

☐ I Accept the above Terms and Conditions

**I Accept** **I Decline** **Back**

**Figure F 7: Individual Practitioner – Terms and Conditions Screen**

- Action:** Read all of the text on the screen moving down the screen as needed.
- Action:** Select the **Print** icon to the right of the text if you want to print this information.
- Action:** Select the **I Accept the above Terms and Conditions** box.
- Action:** Select the **I Accept** button.
- Note:** If you select the **I Accept** button without selecting the **I Accept the above Terms and Conditions** box, a message will appear at the top of the screen indicating you must select the box to proceed any further.
- Note:** If you select the **I Decline** button, a small window will appear with a message asking you to confirm your decision to decline. If you confirm your decision, your registration session is cancelled and a screen indicating this is displayed. You must select the **OK** button to confirm the action, exit that screen and, close the browser window. The system will then return you to the **Account Management** screen illustrated in Figure F 3.

If the role presented in a **Terms and Conditions** screen is not correct, select the **Back** button to return to the **New User Registration – Role Selection** screen as illustrated in Figure F 6 and select the correct role.

After you accept the Individual Practitioner - Terms and Conditions, the **New User Registration** screen will display as illustrated in Figure F 8.

### F 2.3 Entering User Information

After you select the **I Accept the above Terms and Conditions** box and the **I Accept** button in the **Terms and Conditions** screen for your selected role, the system will display a **New User Registration** screen with a **User Information** section requiring your input. This screen is illustrated in Figure F 8.

**Note:** Required fields are indicated by an asterisk (\*) to the right of the field.

**Figure F 8: New User Registration Screen – User Information**

**Action:** Complete the required fields in the **User Information** portion of the screen. You may complete the optional fields as well.

- The First and Last Name must be those on file with the Social Security Administration (SSA).
- The Social Security Number (SSN) must be unique and must be the one on file with the Social Security Administration.
- The Date of Birth must be the one on file with the Social Security Administration.
- A unique, work related email address where you may be contacted is required.
- Enter your email address a second time for verification. Do not cut and paste from one field to the other.

**Note:** The information must be entered in the fields in the formats specified on the screen.

**Action:** Select the **Next** button when you have completed all the required fields.

When you select the **Next** button, the system validates the data you have entered.

- Your name, SSN, and Date of Birth are validated against data on file at the Social Security Administration (SSA).
- Additionally, the system verifies that the SSN you entered does not already exist in an IACS account.
- Your email address is validated to verify that it does not already exist in an IACS account.

If you select the **Cancel** button, your request is cancelled and all the information you entered will be lost. A screen indicating this will be displayed. You must select the **OK** button to confirm the action, exit that screen and, close the browser window.

If your User Information data is **successfully** validated on the first validation attempt, the **Email Address Verification** screen will display as illustrated in Figure F 12. Please go to the **Validation Success** subsection now.

If your User Information data **fails validation** or the validation system is unavailable on the first validation attempt, you will be given two additional opportunities to correct the data in your *User Information* fields. This means that IACS can only attempt to validate your information with the SSA three times. Please review the information in the following **Validation Failure** subsections for more information on validation failures. In the case of system unavailability, you will be presented with a warning message on the screen with instructions to try again later.

### F-2.3.1 Validation Failure - First Attempt

If your User Information data **fails validation** on the first attempt, the **New User Registration** screen will refresh and display a message under the *Email* address field as illustrated in Figure F 9.

The screenshot shows the 'New User Registration' screen for the U.S. Department of Health & Human Services, CMS Centers for Medicare & Medicaid Services. The page title is 'Individuals Authorized Access to the CMS Computer Services (IACS)'. The main heading is 'New User Registration'. Below this, a message states: 'CMS is authorized to validate your personal information using your legal name, Date of Birth and Social Security Number.' The 'User Information' section contains several input fields: 'First Name' (Agugheo), 'MI' (S), 'Last Name' (Mikhaylenko), 'Social Security Number' (751-00-0000), 'Date of Birth' (09/24/1959), 'E-mail' (agugheo@gugen.com), and 'Confirm E-mail' (agugheo@gugen.com). A red error message is displayed below the email fields: 'Your details cannot be validated against the Social Security Administration. Please ensure that correct details are entered above and click Next. After 3 failed attempts, your registration will be cancelled.' A note on the right indicates '\* indicates a required field'. At the bottom left are 'Next' and 'Cancel' buttons. The footer shows 'MB: 0938-0989' and 'Effective date 5/01'.



**Figure F 9: Validation Failure Message – First Attempt**

**Action:** Review the User Information you have entered for correctness.

**Action:** Make any needed changes to your User Information.

**Action:** Select the **Next** button when you are done.

When you select the **Next** button the system will attempt to validate the SSA data again. If a problem is encountered again, a set of questions will appear on the screen as shown in the example in Figure F 10.

### F-2.3.2 Validation Failure – Second Attempt

If your User Information data **fails validation** on the second attempt, the **New User Registration** screen will refresh and display two simple questions for you to answer as illustrated in Figure F 10. These questions are being asked to ensure that the registration request is not being generated by an automated system.

The screenshot shows the 'New User Registration' screen for the U.S. Department of Health & Human Services, CMS Centers for Medicare & Medicaid Services. The page title is 'Individuals Authorized Access to the CMS Computer Services (IACS)'. The main heading is 'New User Registration'. Below this, a message states: 'CMS is authorized to validate your personal information using your legal name, Date of Birth and Social Security Number.' The 'User Information' section contains the following fields:

- First Name:  \*
- Middle Initial:
- Last Name:  \*
- Social Security Number:  \* (Valid SSN Format is XXX-XX-XXXX)
- Date of Birth:  \* (mm/dd/yyyy)
- E-mail:  \*
- Confirm E-mail:  \*

Below the User Information section, there are two simple validation questions:

- Question: What is 2 + 2? Answer:
- Question: What color is green grass? Answer:

A message below the questions states: 'You have been presented with two simple validation questions because the details you entered could not be validated with the Social Security Administration. Please provide correct answers and click Next.' A note at the bottom right indicates '\* indicates a required field'. At the bottom left, there are 'Next' and 'Cancel' buttons. The footer shows 'OMB: 0938-0989' and 'Effective date: 5/08'.

**Figure F 10: Validation Failure Message – Second Attempt with Questions**

**Action:** Correct the **User Information** you have entered.

**Action:** Answer both questions correctly.

**Note:** Do not use numeric characters to answer the questions. Spell out any number answer, for example, do not use the number 4, spell it out as a word, four.

**Action:** Select the **Next** button.

The system will attempt to validate **both your user information and the answers to the questions**.

**If either fails validation**, the screen will refresh and display the appropriate warning message under the *Email* address field. The warning message illustrated in the example in Figure F 11 is for incorrect answers to the two simple questions. The warning message that displays if your User Information fails validation is illustrated in Figure F 9.

The screenshot shows the 'New User Registration' page for the U.S. Department of Health & Human Services, CMS. The page title is 'New User Registration'. Below the title, a message states: 'CMS is authorized to validate your personal information using your legal name, Date of Birth and Social Security Number.' The 'User Information' section contains fields for First Name (Agugheo), MI (S), Last Name (Mikhaylenko), Social Security Number (751-00-0000), Date of Birth (09/24/1959), E-mail (agugheo@gugen.com), and Confirm E-mail (agugheo@gugen.com). A red warning message is displayed: 'The answers to the simple validation questions are not correct. Please provide correct answers to the questions. After 3 failed attempts, the registration will be cancelled.' Below this, a table shows two validation questions: 'What is 2 + 2?' with answer '4' and 'What color is green grass?' with answer 'Brown'. A message below the table states: 'You have been presented with two simple validation questions because the details you entered could not be validated with the Social Security Administration. Please provide correct answers and click Next.' The 'Next' and 'Cancel' buttons are at the bottom. The footer includes 'OMB: 0938-0989' and 'Effective date 5/06'.

Figure F 11: Validation Warning message – Invalid Question Answers

**Action:** Correct the **User Information** you have entered.

**Action:** Answer both questions correctly.

**Note:** Do not use numeric characters to answer the questions. Spell out any number answer, for example, do not use the number 4, spell it out as a word, four.

**Action:** Select the **Next** button.

**Note:** If either your User Information or the answers to the questions fails validation this second time, **your registration will be cancelled**.

**Note:** If your SSA data cannot be validated, please contact your local SSA office for assistance. SSA contact information can be found at: <http://www.ssa.gov/>

If your User Information data is **successfully** validated, the **Email Address Verification** screen will display as illustrated in Figure F 12.

### F-2.3.3 Validation Success

If your User Information data is **successfully** validated, the **Email Address Verification** screen will display as illustrated in Figure F 12.

The screenshot shows the 'Email Address Verification' screen within the IACS system. The header includes the U.S. Department of Health & Human Services logo and the CMS/ Centers for Medicare & Medicaid Services logo. The page title is 'Individuals Authorized Access to the CMS Computer Services (IACS)'. The main heading is 'E-mail Address Verification'. Below this, a message states: 'An e-mail has been sent to you at fmksr@yckra.com with a 8-digit verification code. Please enter the code in the box below from the e-mail and click 'Next' within 30 minutes. Failure to do so will result in cancellation of your Registration Request.' There is a text input field for the 'Verification Code:' with a red asterisk indicating it is a required field, and a 'Re-send verification code' link to its right. A 'Note' section follows, explaining that personal or corporate email and spam filters may block the email, and that users can request a re-send by clicking the link. It also states that users can request a maximum of three re-sends, after which the re-send button will be disabled. A warning advises not to cut and paste the code from the email, as it must be entered exactly as displayed. A final note says: 'If you get an error message saying the code is not valid, please try re-typing the code again exactly as it appears in your e-mail.' At the bottom right, a small note says '\* indicates a required field'. At the bottom left, there are 'Next' and 'Cancel' buttons.

**Figure F 12: Email Address Verification Screen**

You will be sent an email confirming that IACS has received your request and providing you with a Verification Code number that you must enter in the *Verification Code* field on the **Email Address Verification** screen. A sample email is illustrated in Figure F 13.

**Action:** Leave the **Email Address Verification** screen **open**.

**Note:** You must leave the **Email Address Verification** screen open while you obtain your *Verification Code* from your email.

**Action:** Go to your email Inbox and open the message with your verification code. The email subject line will be: **Email Address Verification**.

**Note:** If you do not receive the verification email, select the **Re-send Verification Code** hyperlink to the right of the *Verification Code* field on the **Email Address Verification** screen. You may ask to have it resent up to 3 times. Contact your Help Desk if you need assistance or do not receive the Email Address Verification email.



You are receiving this email in response to a Registration request being submitted by you in IACS. Please enter the following code in the Registration window to complete verification and proceed with your request.

Verification Code: <your verification code appears here>

Thank you,

IACS

Please do not reply to this system-generated email.

**Figure F 13: Example of Email Address Verification Email**

**Action:** Write down your *Verification Code*.

**Note:** You will have **30 minutes to complete this step of the registration process**. If you do not complete this step in 30 minutes, your request will be cancelled and all the information you have entered will be lost.

**Note:** If you select the **Cancel** button, your application request will be cancelled and all the information you entered will be lost. A screen indicating this will be displayed. You must select the **OK** button to confirm the action, exit that screen and, close the browser window. The system will then return you to the **CMS Applications Portal Introduction** screen illustrated in Figure F 2.

**Action:** Return to the **Email Address Verification** screen.

U.S. Department of Health & Human Services www.hhs.gov

**CMS** Centers for Medicare & Medicaid Services LOGOUT HELP

**Individuals Authorized Access to the CMS Computer Services (IACS)**

**E-mail Address Verification**

An e-mail has been sent to you at fmkjsr@lyckra.com with a 8-digit verification code. Please enter the code in the box below from the e-mail and click 'Next' within 30 minutes. Failure to do so will result in cancellation of your Registration Request.

Verification Code:  \* [Re-send verification code](#)

**Note:** Personal or corporate e-mail and spam filters may block the e-mail containing your verification code. You may request your verification code to be re-sent by clicking the re-send link to the right of the E-mail Verification Code field.

You may request your verification code for a maximum of three re-sends, after which the re-send button will be disabled.

Do not cut and paste the e-mail verification code from the e-mail onto this screen. You must enter the code exactly as displayed, without any extra spaces or characters.

If you get an error message saying the code is not valid, please try re-typing the code again exactly as it appears in your e-mail.

\* indicates a required field

Figure F 14: Email Address Verification Screen

**Action:** Enter the **Verification Code** in the *Verification Code* field on the **Email Address Verification** screen illustrated in Figure F 14.

**Note:** You must enter the code exactly as it is displayed in the email message without any extra spaces or characters.

**Action:** Select the **Next** button.

**Note:** If, after four attempts, you have not entered your email verification code correctly, your IACS registration request will be cancelled and you must start a new request.

When you enter the correct verification code and select the **Next** button on the **Email Address Verification** screen, the screen will refresh and the **New User Registration** screen will display as illustrated in Figure F 15. This screen has additional sections for you to complete.

## F 2.4 Entering Professional Contact Information

The top portion of the **New User Registration** screen illustrated in Figure F 15 contains the *User Information* fields you have previously seen with the data you entered pre-populated in those fields you completed. This data cannot be changed.

The center of the screen contains an area labeled **Professional Contact Information**. In this portion of the screen, IACS requires you to enter information on where you can be contacted on a professional basis.

## IACS User Guide Attachment F

At the bottom of the screen, the area labeled **Access Request** displays your *Community Type*: **Provider/Supplier** and your *Role*: **Provider Individual Practitioner**.

The screenshot shows the 'New User Registration' screen for the U.S. Department of Health & Human Services, CMS. The page is titled 'New User Registration' and includes a sub-header 'Individuals Authorized Access to the CMS Computer Services (IACS)'. Below the header, there is a section for 'User Information' with fields for First Name, MI, Last Name, Social Security Number, Date of Birth, E-mail, and Confirm E-mail. The 'Professional Contact Information' section includes fields for Office Telephone, Company Name, Company Telephone, Country, Address 1, Address 2, City, State/Territory, and Zip Code. The 'Access Request' section shows the Community Type as 'Provider/Supplier' and the Role as 'Provider Individual Practitioner'. A note at the bottom right states '\* indicates a required field'. The 'Next' and 'Cancel' buttons are at the bottom left.

U.S. Department of Health & Human Services www.hhs.gov

**CMS** Centers for Medicare & Medicaid Services

Individuals Authorized Access to the CMS Computer Services (IACS)

### New User Registration

CMS is authorized to validate your personal information using your legal name, Date of Birth and Social Security Number.

#### User Information

First Name:  \* MI:  Last Name:  \*

Social Security Number:  \* Valid SSN Format is XXX-XX-XXXX Date of Birth:  \* Valid Date of Birth format is mm/dd/yyyy

E-mail:  \* Confirm E-mail:  \*

Valid Email Format is user@internetprovider.domain. Examples of domain: com, net, gov, etc.

#### Professional Contact Information

Office Telephone:  \* Ext:  Valid Telephone Number Format is XXX-XXX-XXXX

Company Name:  Company Telephone:  Ext:

Country:  \*

Address 1:  \* Address 2:

City:  \* State/Territory:  \* Zip Code:  \* -

#### Access Request

Community Type: **Provider/Supplier**

\* indicates a required field

Figure F 15: New User Registration Screen – Professional Contact Information

**Action:** Enter your professional contact information in the fields provided in the **Professional Contact Information** portion of the **New User Registration** screen.

**Note:** All required fields must be completed. Required fields are indicated by an asterisk (\*) to the right of the field.

**Note:** If you need help or have questions, please contact the Help Desk associated with the **Provider/Supplier** Community.

This Help Desk is the External User Services, EUS, Help Desk. The phone number is 1-866-484-8049. The TTY/TDD number is 1-866-523-4759. Their email address is [EUSsupport@cgi.com](mailto:EUSsupport@cgi.com). Their hours of operation are Monday-Friday 7am to 7pm Eastern Standard Time EST. They may be contacted at Post Office Box 792750, San Antonio, Texas, 78216.

**Action:** Select the **Next** button when you are done filling in all the required fields on the **New User Registration** screen.

When you select the **Next** button, the system will validate the Professional Contact information you have entered in each of the fields on the **New User Registration** screen. If there is any invalid data or there are any required fields not filled in, the system will redisplay the **New User Registration** screen with a warning message at the top of the screen informing you of data that needs to be corrected or required fields that still need to be filled in.

**Note:** If you select the **Cancel** button, your application request will be cancelled and all the information you entered will be lost. A screen indicating this will be displayed. You must select the **OK** button to confirm the action, exit that screen and, close the browser window. The system will then return you to the **CMS Applications Portal Introduction** screen illustrated in Figure F 2.

## F 2.5 Completing Your Registration

If the data entered during the registration process is valid and all the required fields have been completed, the system will display a **Review Registration Details** screen in which you can review the information you entered in the **New User Registration** screen. An example of this screen, the **Review Registration Details**, is illustrated in Figure F 16.

U.S. Department of Health & Human Services [www.hhs.gov](http://www.hhs.gov)

**CMS** Centers for Medicare & Medicaid Services

Individuals Authorized Access to the CMS Computer Services (IACS)

### Review Registration Details

The following is the information you entered on the New User Registration Form.  
Please review the information below to verify correctness.

- To modify any of the information, click **Edit**.
- If the information is correct and you wish to proceed, click **Submit**.

<b>First Name:</b>	Waxamdee	<b>MI:</b>	Y	<b>Last Name:</b>	Mikhaylenko
<b>Social Security Number:</b>	*****0000				
<b>Date of Birth:</b>	09/09/1959				
<b>E-mail:</b>	slspnm@bugwb.com				
<b>Office Telephone:</b>	301-100-0000 X 382				
<b>Company Name:</b>	Waxamdee Mikhaylenko	<b>Company Telephone:</b>	301-100-0000		
<b>Country:</b>	United States				
<b>Address 1:</b>	1165 W. Williams	<b>Address 2:</b>			
<b>City:</b>	Paint	<b>State/Territory:</b>	MD	<b>Zip Code:</b>	37545 - 3754
<b>User/Community Type:</b>	Provider/Supplier				
<b>Role:</b>	Individual Practitioner				

**Figure F 16: Review Registration Details Screen**

**Action:** Select the **Submit** button when you are satisfied that your registration information is correct. A **Registration Acknowledgement** screen will display as illustrated in Figure F 17.

## IACS User Guide Attachment F

- Select the **Edit** button if there is professional contact information you want to modify. The **New User Registration** screen will be redisplayed with all your information populated in the appropriate fields. You may modify the information that you want and, when you are done, select the **Next** button. You will again be presented with the **Review Registration Details** screen.

**Note:** The **User Information** data has already been validated and **cannot be edited**.

- If you select the **Cancel** button, your application request will be cancelled and all the information you entered will be lost. A screen indicating this will be displayed. You must select the **OK** button to confirm the action, exit that screen and, close the browser window. The system will then return you to the **CMS Applications Portal Introduction** screen.

The screenshot shows the 'Registration Acknowledgement' screen within the CMS (Centers for Medicare & Medicaid Services) portal. The header includes the U.S. Department of Health & Human Services logo and the URL www.hhs.gov. Below the header, the text 'Individuals Authorized Access to the CMS Computer Services (IACS)' is displayed. The main content area is titled 'Registration Acknowledgement' and contains the following text: 'Your IACS request has been successfully submitted.' followed by a 'Print' icon. Below this, it states 'The tracking number for your request is: REQ-1184161808277' and 'Please use this number in all correspondences concerning this request.' It also mentions 'You will be contacted via e-mail with CMS's determination.' and 'Click "OK" to close your browser window.' At the bottom left, there is an 'OK' button. The footer includes 'OMB: 0938-0989' on the left and 'Effective date 5/06' on the right.

**Figure F 17: Registration Acknowledgement Screen**

The **Registration Acknowledgement** screen indicates your registration request has been submitted successfully and provides a tracking number for your request. **Record this tracking number** and use it if you have questions about the status of your request.

**Note:** You can print the information contained on the **Registration Acknowledgement** screen by selecting the **Print** icon.

**Action:** Select the **OK** button.

**Note:** Your registration will not be completed unless the **OK** button is selected.

The **Registration Acknowledgement** screen and browser window will close and, the system will return you to the **Account Management** screen as illustrated in Figure F 3.

## F 2.6 After Completing Your Registration

After you complete your IACS New User Registration, you will be sent an email confirming that IACS has received your request and providing you with a Request Number. You should use that request number if you need to contact your Help Desk regarding your request. This email is illustrated in Figure F 18.

If this email notification is not received within 24 hours after you register, please contact the External User Services (EUS) Help Desk at 1-866-484-8049. The TTY/TDD number is 1-866-523-4759. Their hours of operation are Monday-Friday 7am to 7pm Eastern Standard Time EST. They may also be contacted by email at [EUSupport@cgi.com](mailto:EUSupport@cgi.com).

Please have your request number from the Registration Acknowledgement screen available when you call EUS. If you email EUS, please include the request number.

Please use the following Request Number when contacting CMS regarding this request:

The tracking number for your request is: REQ--<your request number will appear here>

Your request has been received by the Individuals Authorized Access to the CMS Computer Services (IACS).

Thank you,  
IACS

Please do not reply to this system-generated email.

**Figure F 18: Example of Request Number Email**

Once your account has been created, two separate email messages will automatically be sent to you.

1. The first (**Subject: FYI: User Creation Completed – Account ID Enclosed**) will contain your IACS User ID. This email is illustrated in Figure F 19.
2. The second (**Subject: FYI: User Creation Completed – Password Enclosed**) will contain the format of your initial password. You will be required to change your initial password the first time you login. This email is illustrated in Figure F 20.

## IACS User Guide Attachment F

Request for access to a Centers for Medicare & Medicaid Services' system has been approved

The tracking number of your request is REQ--<your request number will appear here>

To access the CMS Internet applications, use the following User ID: AAAAnnn

Thank you,  
IACS

Please do not reply to this system-generated email.

**Figure F 19: Example of User ID Email**

**Note:** The User ID will be in the following alphanumeric format **AAAAnnn**, where **AAAA** are letters, and **nnn** are numbers.

The tracking number for your request is REQ-<your tracking number will appear here>

Your temporary one time password is the first two letters of your last name (1st letter upper case, 2nd - lower case) and the last 6 digits of your Social Security Number.

Please go to the link below to change your password.

Go to <https://applications.cms.hhs.gov>

Read the Privacy Statement and select the Enter the CMS Applications Portal button.

Select the **Account Management** link on the top, and then the **My Profile** link.

Log into IACS using your User ID and password to change your password.

Thank You,  
IACS

Please do not reply to this system-generated email.

**Figure F 20: Example of a Temporary One-time Password Email**

**Action:** Go to the **First Time Login to IACS** Section in this User Guide Attachment and follow the steps for logging in and changing your password.



### F 3.0 First Time Login to IACS

When you are ready to login to IACS for the first time, please take the following actions:

- Action:** Using your IACS User ID and your temporary, one-time password that were sent to you by email, login to the IACS system starting at <https://applications.cms.hhs.gov> on the CMS website.
- Action:** Read the contents of the **CMS Applications Portal WARNING/REMINDER** screen, and agree by selecting the **Enter CMS Applications Portal** button. You can refer to Figure F 1 for an illustration of this screen.

The **CMS Applications Portal Introduction** screen will display as illustrated in Figure F 21.

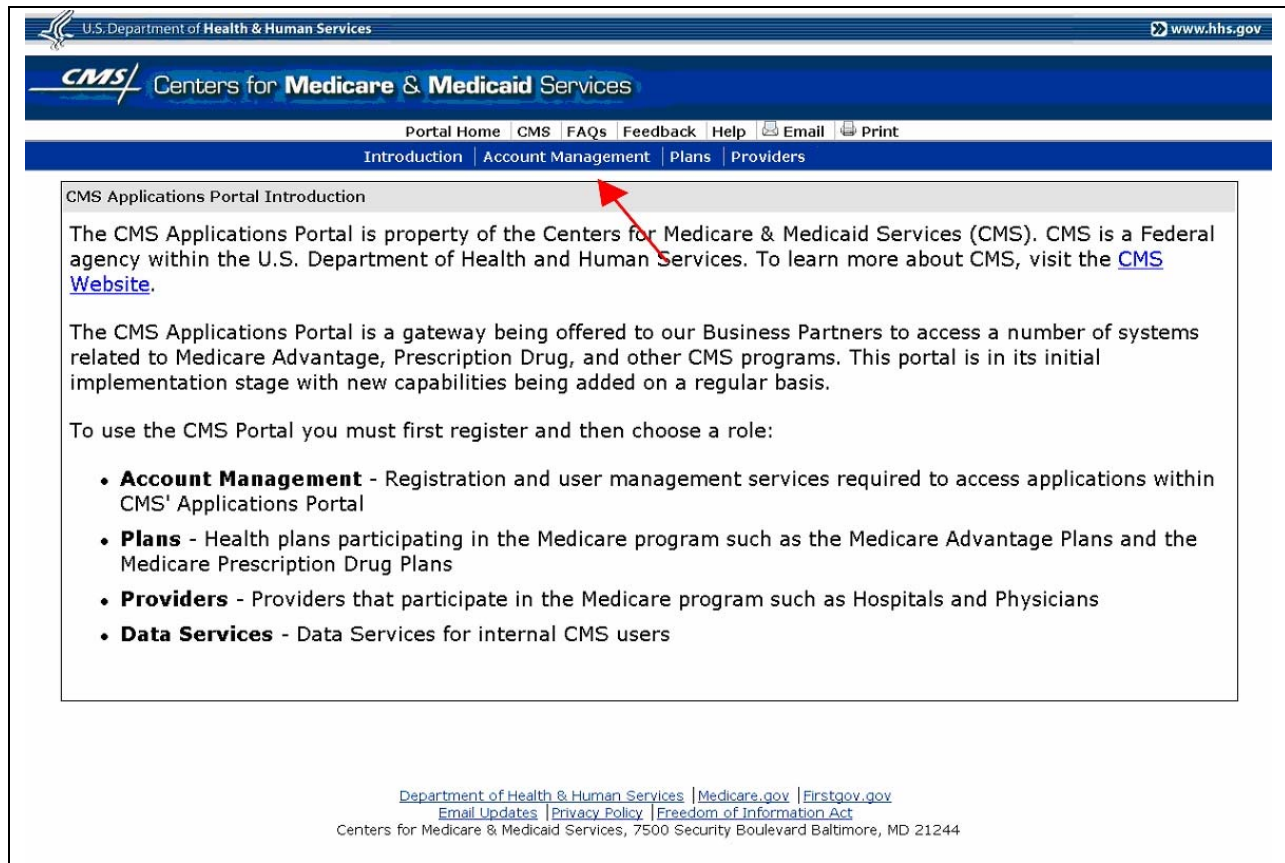


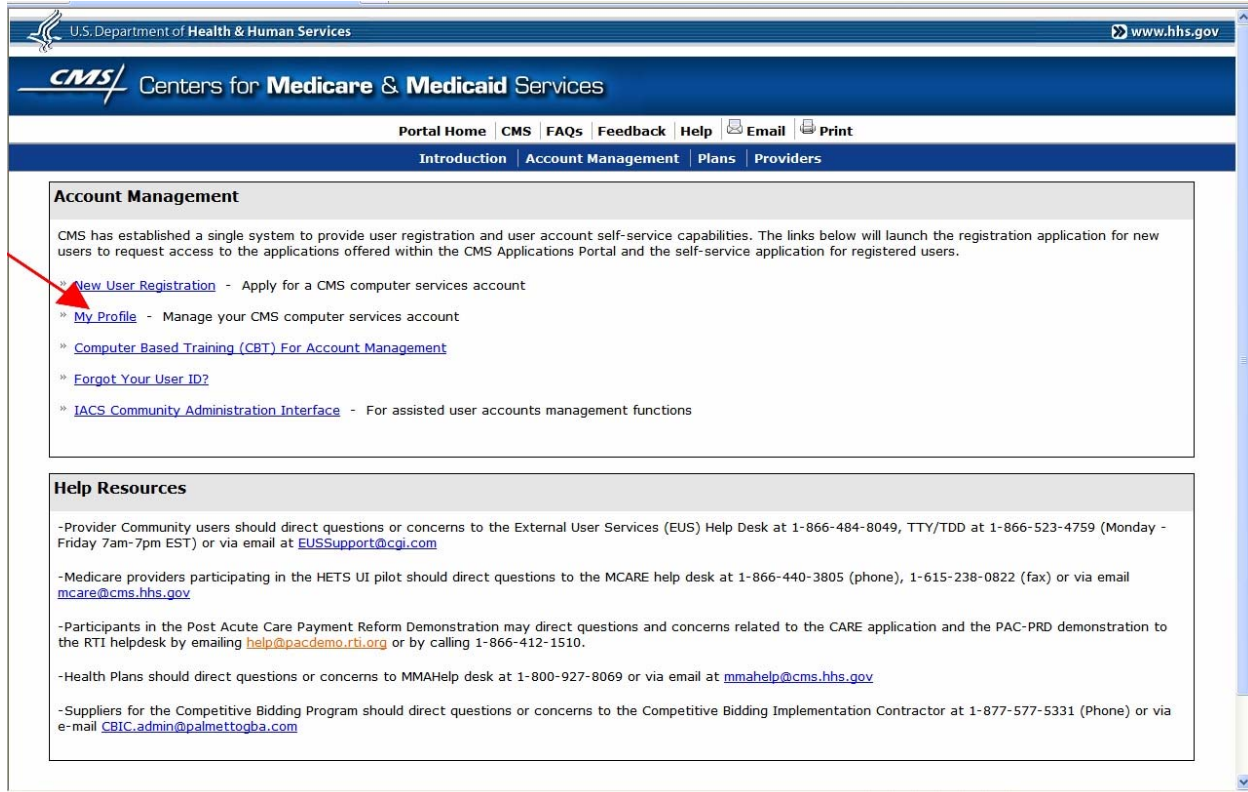
Figure F 21: CMS Applications Portal Introduction Screen

- Action:** Select the **Account Management** hyperlink in the menu bar towards the top of the screen.

The screen will refresh and display the **Account Management** screen as illustrated in Figure F 22.



## IACS User Guide Attachment F



**Figure F 22: Account Management Screen**

**Action:** Select the **My Profile** hyperlink on the **Account Management** screen.

The **Login to IACS** screen will display as illustrated in Figure F 23.

## IACS User Guide Attachment F

U.S. Department of Health & Human Services [www.hhs.gov](http://www.hhs.gov)

**CMS** Centers for **Medicare & Medicaid** Services [HELP](#)

**Individuals Authorized Access to the CMS Computer Services (IACS)**

**Login to IACS**

The Federal Information Security Management Act (FISMA) of 2002 requires that the local system used to access CMS Computer Systems has up to date operating system patches and is running anti-virus software.

You must have an IACS User ID and Password to login.  
If this is your first time logging in, please use the User ID and the one-time password that was e-mailed to you by IACS.

Effective September 29, 2006, your password will be set to expire every sixty days. In the event your password does expire, you will be prompted to change your password. For further assistance, contact your CMS help desk.

Enter your User ID and Password, and then click **Login**. If you can't remember your password, click **Forgot Your Password?**

User ID

Password

[Login](#) [Forgot Your Password?](#)

**Figure F 23: Login to IACS Screen**

**Action:** Enter your new *User ID*.

**Action:** Enter your temporary, one-time *Password*.

**Action:** Select the *Login* button.

### **F 3.1 Change Password**

The **Change Password** screen illustrated in Figure F 24 will display. This screen will also display when you login after a password reset.

U.S. Department of Health & Human Services

www.hhs.gov

**CMS** Centers for Medicare & Medicaid Services

Individuals Authorized Access to the CMS Computer Services (IACS)

## Change Password

ⓘ Your password has expired for account AAAAnnn on resource Lighthouse (Lighthouse). Please change it now.

New Password

Confirm New Password

### CMS Password Policy

- The password must be changed at least every 60 days.
- The password must be 8 characters long.
- The password must contain at least 2 letters and 1 number.
- Letters must be mixed case (i.e., your password must have at least 1 upper case letter and 1 lower case letter).
- The password must not contain your user UID.
- The password must not contain 4 consecutive characters from any of your previous 6 passwords.
- The password must be different from your previous 6 passwords.

**Figure F 24: Change Password Screen**

**Action:** Enter a new password in the *Password* field.

**Action:** Re-enter it in the *Confirm Password* field as verification.

**Action:** Select the **Change Password** button.

**Note:** The system will validate the composition of the password you entered before proceeding to the next screen. If the password you entered complies with CMS Password Policy, the **My Profile** screen will redisplay as illustrated in Figure F 26.

Your IACS password must conform to the following CMS Password Policy:

- The password must be 8 characters long.
- The password must contain at least two letters and one number (no special characters).
- Letters must be mixed case. Your password must have at least one upper case and one lower case letter.
- The password must not contain your User ID.
- The password must not contain 4 consecutive characters of any of your previous 6 passwords.
- The password must be different from your previous 6 passwords.

**Note:** Passwords cannot begin with a number.

In addition:

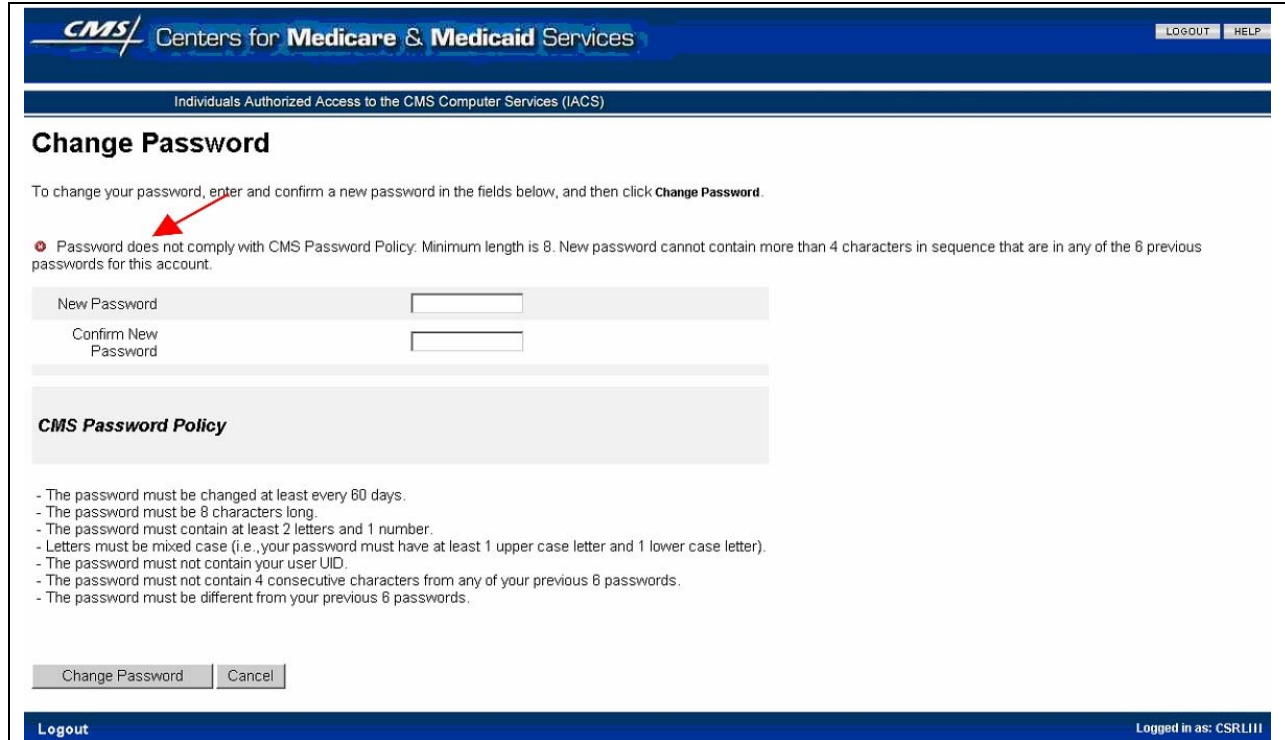
The password must not contain any of the following reserved words or number combinations: PASSWORD, WELCOME, CMS, HCFA, SYSTEM, MEDICARE, MEDICAID, TEMP, LETMEIN, GOD, SEX, MONEY, QUEST, 1234, F20ASYA, RAVENS, REDSKIN, ORIOLES, BULLETS, CAPITOL, MARYLAND, TERPS, DOCTOR, 567890, 12345678, ROOT, BOSSMAN, JANUARY, FEBRUARY, MARCH, APRIL, MAY, JUNE, JULY, AUGUST, SEPTEMBER, OCTOBER, NOVEMBER, DECEMBER, SSA, FIREWALL, CITIC, ADMIN, UNISYS, PWD, SECURITY, 76543210, 43210, 098765, IRAQ, OIS, TMG, INTERNET, INTRANET, EXTRANET, ATT, LOCKHEED

If the **Change Password** screen *reappears*, a password policy violation has occurred. Read the warning message that is displayed at the top of the screen, as illustrated in Figure F 25, and proceed accordingly.

Examples of password policy violation messages:

- Password does not comply with CMS Password Policy. Minimum length is 8. New password cannot contain more than 4 characters in sequence that are in any of the previous 6 passwords for this account.
- A new password cannot match any of the 6 previous passwords for this account.
- The **Confirm Password:** and **Password:** fields do not match.
- Passwords must have at least 2 alpha characters.
- Passwords must have at least 1 upper case and 1 lower case alpha character.
- Passwords must have at least 1 numeric character.
- Passwords cannot begin with a number.
- Passwords must be 8 characters in length.

**Note:** You must change your password at least every 60 days, per CMS Password Policy.



**CMS** Centers for Medicare & Medicaid Services LOGOUT HELP

Individuals Authorized Access to the CMS Computer Services (IACS)

## Change Password

To change your password, enter and confirm a new password in the fields below, and then click **Change Password**.

❗ Password does not comply with CMS Password Policy. Minimum length is 8. New password cannot contain more than 4 characters in sequence that are in any of the 6 previous passwords for this account.

New Password

Confirm New Password

**CMS Password Policy**

- The password must be changed at least every 60 days.
- The password must be 8 characters long.
- The password must contain at least 2 letters and 1 number.
- Letters must be mixed case (i.e., your password must have at least 1 upper case letter and 1 lower case letter).
- The password must not contain your user UID.
- The password must not contain 4 consecutive characters from any of your previous 6 passwords.
- The password must be different from your previous 6 passwords.

Logout Logged in as: CSRLIII

**Figure F 25: Change Password Policy Violation Message Screen**

**Action:** Enter a new password in the *Password* and *Confirm New Password* fields, and again.

**Action:** Select the ***Change Password*** button.

### F 3.2 Change Answers to Authentication Questions

After you have successfully changed your password, the **My Profile** screen will redisplay as illustrated in Figure F 26.

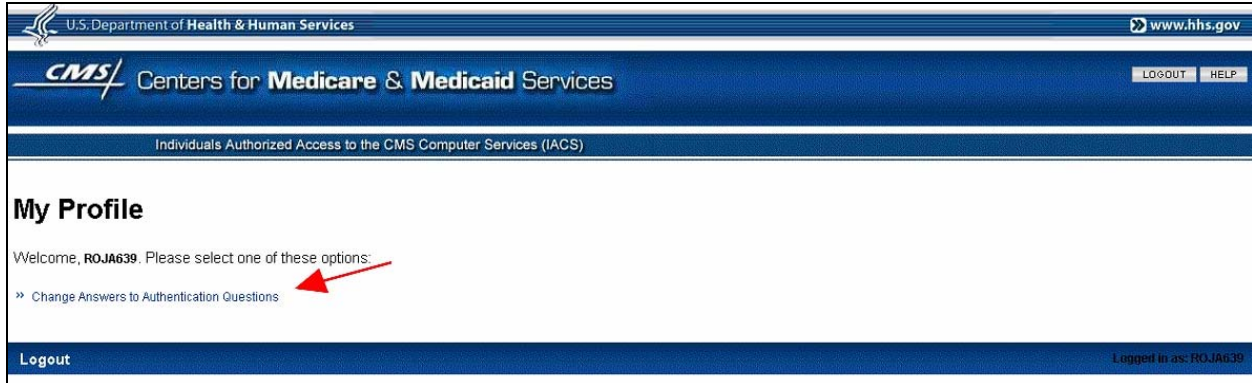


Figure F 26: My Profile Screen with Change Answers to Authentication Questions Hyperlink

**Action:** Select the **Change Answers to Authentication Questions** hyperlink.

After selecting the **Change Answers to Authentication Questions** hyperlink the **Change Answers to Authentications Questions** screen will display as illustrated in Figure F 27.

Figure F 27: Change Answers to Authentication Questions Screen

**Action:** Answer at least two of the ten **Authentication Questions** listed.

**Action:** Select the **Save** button when you have finished answering the questions you want to answer.

If you select the **Cancel** button, your answers will be lost and you will be returned to the **My Profile** screen as illustrated in Figure F 26.

The **Change Answers Results** screen will display listing the Authentication Questions you have answered as illustrated in Figure F 28. The answers to the Authentication Questions will be displayed to secure the information.



Attribute	Value	Status
ROJA639 on Lighthouse		
AuthenticationQuestions	What city were you born in?? ****	
	What year did you graduate from high school?? ****	

OK

Logout

Logged in as: ROJA639

Figure F 28: Change Answers Results Screen

**Action:** Select the **OK** button to continue.

The **My Profile** screen will display with all the menu options available for your approved role as illustrated in Figure F 29.

Welcome, HWUA323. Please select one of these options:

- » Modify User/Contact Information
- » Modify Account Profile

Depending on your role, you can:

- Change your Application Access
- Associate or Disassociate with an Organization/User Group

- » Change Answers to Authentication Questions
- » Change Password

Logout

Logged in as: HWUA323

Figure F 29: My Profile Screen

After your first time login to IACS the following will apply:

- The **Change Password** and **Change Answers to Authentication Questions** hyperlinks only need to be selected if you want to change those values.
- If you have not logged into IACS **for more than 60 days after the last time you changed your password**, you will be required to answer selected Authentication Questions to change your password.



## IACS User Guide Attachment F

- If you have not logged into IACS ***for more than 120 days after the last time you changed your password***, you will be required to provide the last four digits of your SSN and your email address in addition to answering selected Authentication Questions.
- If you have not logged into IACS ***for more than 180 days after the last time you changed your password***, you will be required to call your Help Desk for assistance since your IACS account will be disabled.

## F 4.0 Modify User or Contact Information

You may need to modify your existing IACS account profile to update your account's user or professional contact information, modify your User Community role, and/or request access to other CMS Applications and User Communities.

This section describes how to modify the **User or Contact Information** that is in your IACS Account Profile.

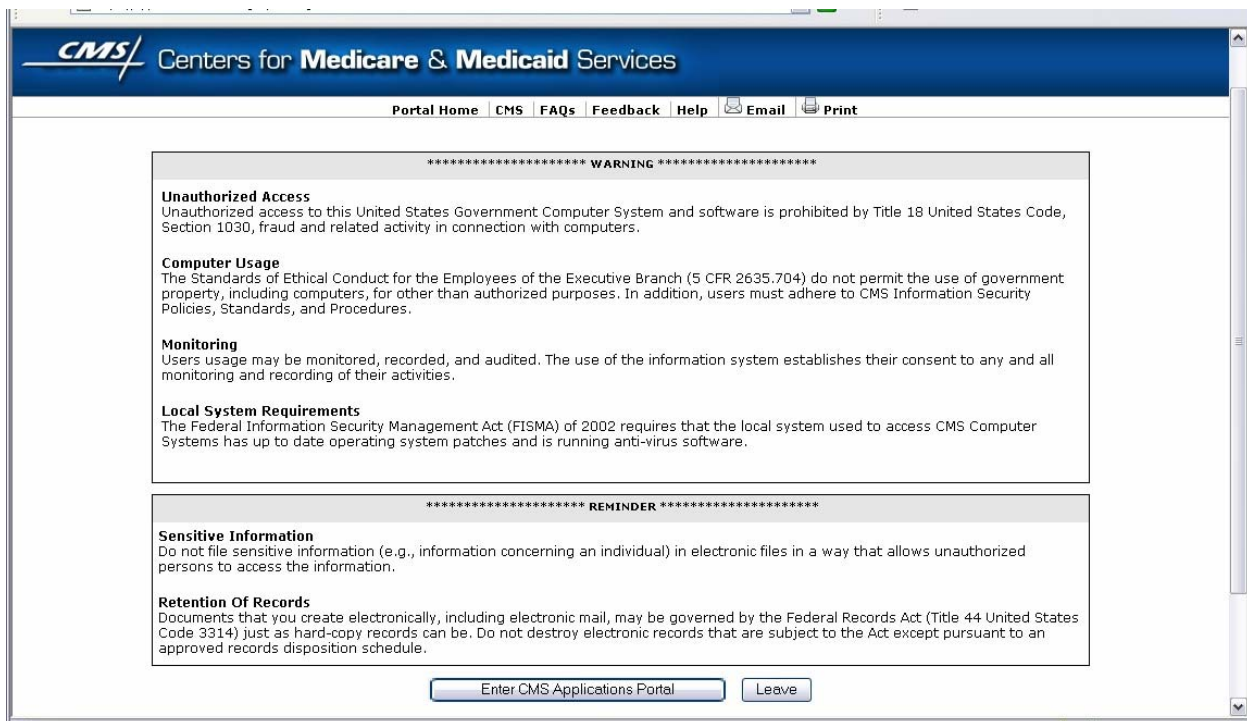
**Note:** To see how to modify your **Access Request** information, and/or request access to other CMS Applications and User Communities, please go to Section F 5.0 of this document.

### F 4.1 Accessing the Modify User or Contact Information Hyperlink

The following steps and screens show you how to access your account profile in IACS to make the desired modifications.

**Action:** Browse to <https://applications.cms.hhs.gov> on the CMS website.

The **CMS Applications Portal WARNING/REMINDER** screen will display as illustrated in Figure F 30.



**Figure F 30: CMS Applications Portal WARNING/REMINDER Screen**

**Action:** Read the important information on this screen and indicate your agreement by selecting the **Enter CMS Applications Portal** button.

## IACS User Guide Attachment F

If you do not want to proceed any further and you want to exit, select the **Leave** button.

The **CMS Applications Portal Introduction** screen will display as illustrated in Figure F 31.

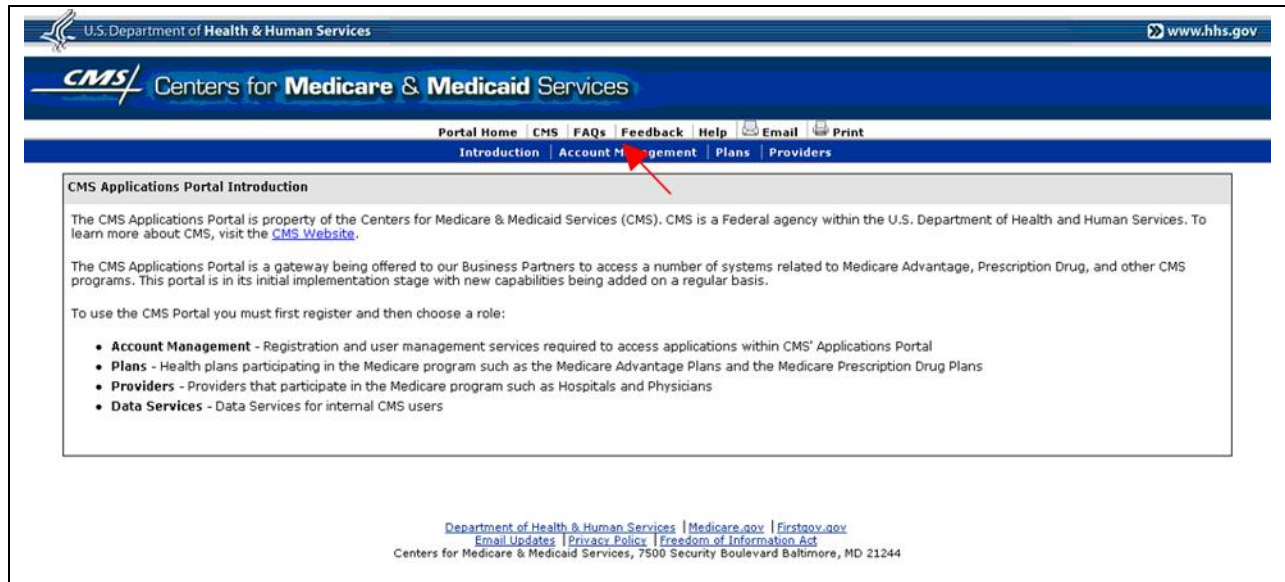


Figure F 31: CMS Applications Portal Introduction Screen

**Action:** Select the **Account Management** hyperlink in the menu bar towards the top of the screen.

The **Account Management** screen will display as illustrated in Figure F 32.

## IACS User Guide Attachment F

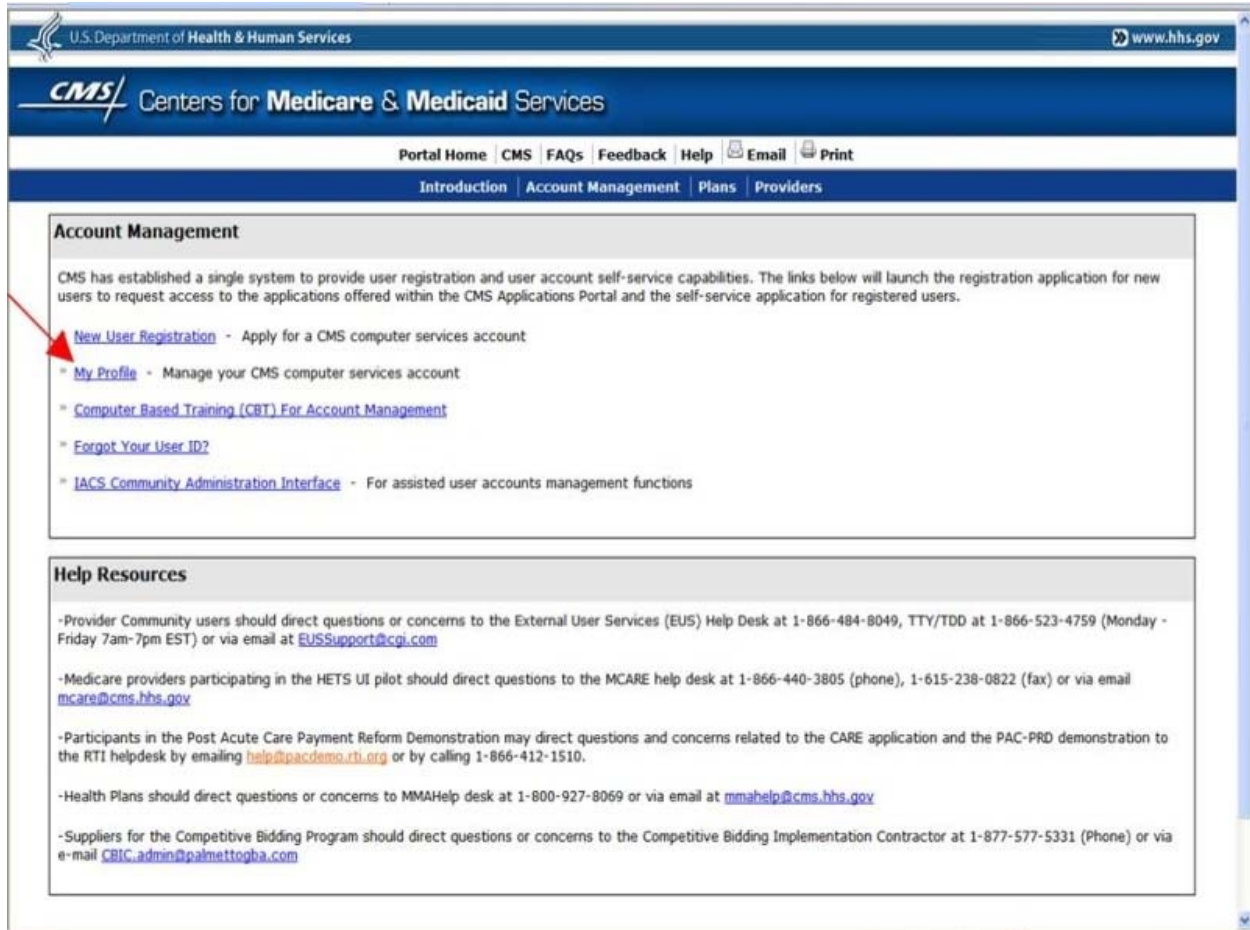


Figure F 32: Account Management Screen

**Action:** Select the **My Profile** hyperlink.

**Note:** The bottom portion of the screen labeled **Help Resources** provides Help Desk contact information.

The **Login to IACS** screen will display as illustrated in Figure F 33.

U.S. Department of Health & Human Services [www.hhs.gov](http://www.hhs.gov)

**CMS** Centers for **Medicare & Medicaid** Services [HELP](#)

**Individuals Authorized Access to the CMS Computer Services (IACS)**

### Login to IACS

The Federal Information Security Management Act (FISMA) of 2002 requires that the local system used to access CMS Computer Systems has up to date operating system patches and is running anti-virus software.

You must have an IACS User ID and Password to login.  
If this is your first time logging in, please use the User ID and the one-time password that was e-mailed to you by IACS.

Effective September 29, 2006, your password will be set to expire every sixty days. In the event your password does expire, you will be prompted to change your password. For further assistance, contact your CMS help desk.

Enter your User ID and Password, and then click **Login**. If you can't remember your password, click **Forgot Your Password?**

User ID

Password

Figure F 33: Login to IACS Screen

**Action:** Enter your **User ID**

**Action:** Enter your **Password**.

**Action:** Select the **Login** button.

The **My Profile** screen will display as illustrated in Figure F 34. This screen contains the following hyperlinks:

- **Modify User/Contact Information** – Provides access to the IACS functionality that will allow you to request changes to your User and/or Professional Contact Information. For additional information, see Section F 4.2 below.
- **Modify Account Profile** – Provides access to the IACS functionality that will allow you to request changes to your IACS Account Profile such as adding CMS application access or user communities. For additional information, see Section F 5.0 in this User Guide Attachment.
- **Change Answers to Authentication Questions** – Provides access to the IACS functionality that will allow you to change or answer additional authentication questions. For additional information, see the First Time Login to IACS Section in this User Guide Attachment.
- **Change Password** – Provides access to the IACS functionality that will allow you to change your IACS password. For additional information, see the First Time Login to IACS Section in this User Guide Attachment.

## IACS User Guide Attachment F

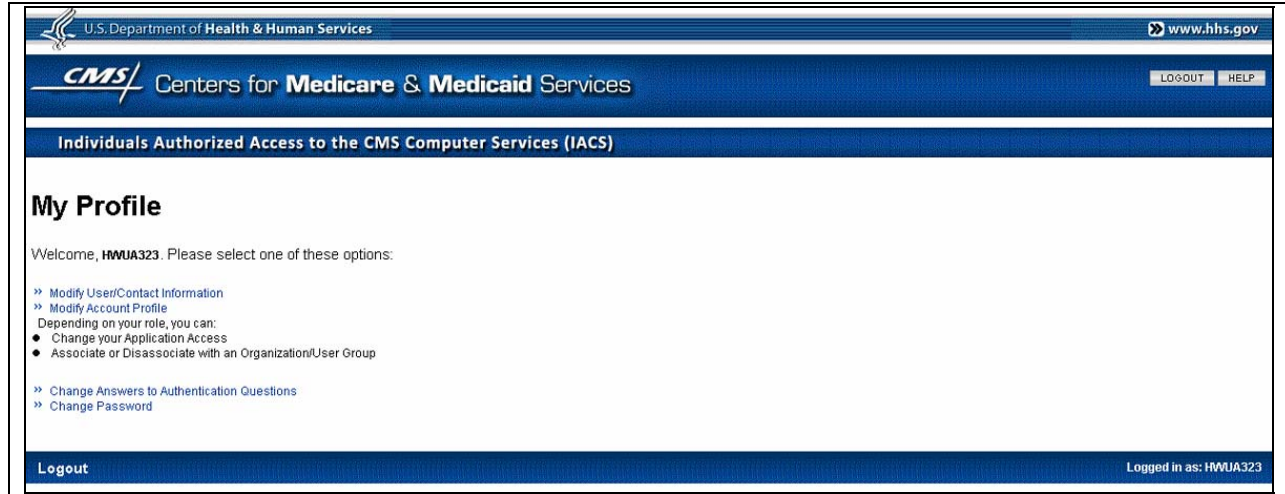


Figure F 34: My Profile Screen

**Action:** Select the **Modify User/Contact Information** hyperlink and continue to Section F 4.2 below.

### F 4.2 Using the Modify User or Contact Information Hyperlink

The **Modify User/Contact Information** hyperlink provides you with the option to modify the **User Information** and/or **Professional Contact Information** you provided during your IACS registration or updated later. If you change your telephone number or move to a different address, you can update that information by selecting this hyperlink.

**Note:** When you select the **Modify User/Contact Information** hyperlink, the **Modify User/Contact Information** screen displays as illustrated in Figure F 35. The **User Information** fields are filled in with the information stored in IACS. The SSN field and your social security number are not displayed.



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CMS Centers for Medicare & Medicaid Services

LOGOUT HELP

Individuals Authorized Access to the CMS Computer Services (IACS)

### Modify User/Contact Information

#### User Information

User ID: HWUA323

First Name: Michael \* MI: M Last Name: Mikhaylenko \*

Date of Birth: 03/11/1968 \* Valid Date of Birth format is mm/dd/yyyy

Email Address: MMMike@network.net \*

Valid E-mail address format is user@internetprovider.domain. Examples of domain: com, net, gov, etc.

#### Professional Contact Information

Office Telephone: 828-100-1828 \* Ext: 828 Valid Telephone Number Format is XXX-XXX-XXXX

Company Name: Michael Associates Company Telephone: 828-100-1828 Ext: 828

Country: United States \*

Address 1: 1932 N. Wilson \* Address 2: \*

City: Paint \* State/Territory: MD \* Zip Code: 82892 \* - \*

\* indicates a required field

Next Cancel

OMB: 0938-0989 Effective date 5/06

Logout Logged in as: HWUA323

Figure F 35: Modify User/Contact Information Screen

**Action:** Modify your *User and/or Professional Contact Information* as needed.

**Action:** Select the **Next** button when you have completed making your changes.

**Note:** If you make changes to your email address, the screen will refresh when you leave the Email field after making your change and a *Confirm Email Address* field will appear in which you must confirm your new email address.

The following validation processes will apply on *User Information* changes:

- A *First Name* change will be validated against information on file at the Social Security Administration (SSA).
- A *Last Name* change will be validated against information on file at the SSA.
- A *Date of Birth* change will be validated against information on file at the SSA.
- An *Email Address* change will be validated to be unique as stored in IACS.

When you select the Next button, the system will display the **Modify Request Confirmation** screen as illustrated in Figure F 36.

The screenshot shows the IACS (Individuals Authorized Access to the CMS Computer Services) interface. At the top, there is a blue header bar with the U.S. Department of Health & Human Services logo and the text "U.S. Department of Health & Human Services". Below this is another blue bar with the CMS logo and the text "Centers for Medicare & Medicaid Services". A third blue bar contains the text "Individuals Authorized Access to the CMS Computer Services (IACS)". The main content area has a title "Modify Request Confirmation". Below the title, there is a light gray box containing the following text: "You made changes to your profile. To submit your request please click **Submit** button. If you want to edit your changes please click **Edit** Button. If you want to cancel the changes, which you made please click **Cancel** button". Below this text are three buttons: "Submit", "Edit", and "Cancel". At the bottom left, there is a small gray box with the text "OMB: 0938-0989". At the bottom right, there is a blue bar with the text "Logout".

Figure F 36: Modify Request Confirmation Screen

**Action:** Select the **Submit** button to submit your modification request.

**Note:** Your modifications will not be completed unless the **Submit** button is selected.

- Select the **Edit** button to return and edit your changes.
- If you select the **Cancel** button, your request will be cancelled and any modifications you entered will be lost. A screen indicating this will be displayed. You must select the **OK** button to confirm the action, exit that screen and, close the browser window.

When you select the **Submit** button, a **Modification Request Acknowledgement** screen will display as illustrated in Figure F 37.



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**CMS** Centers for Medicare & Medicaid Services

LOGOUT HELP

**Individuals Authorized Access to the CMS Computer Services (IACS)**

**Modification Request Acknowledgement**

Thank you for your request to modify registration.  
The tracking number for your request is: REQ-1214411452843

Print

Please use this number in all correspondences concerning this request.  
You will be notified via e-mail once your request has been processed.

Contact your Help Desk if you need further assistance.  
Your Help Desk contact information is listed in the "Help Resources" portion  
of the Account Management page in the CMS Applications Portal.

OK

OMB: 0938-0989

Effective date  
5/06

Logout

Logged in as: AVKU632

**Figure F 37: Modify Request Acknowledgement Screen**

The **Modify Request Acknowledgement** screen indicates your request has been successfully submitted and provides a tracking number for your request. **Record this tracking number** and use it if you have questions about the status of your request.

**Note:** You can print the information contained on the screen by selecting the **Print** icon.

**Action:** Select the **OK** button to complete the Modify Account Profile process.

The **Modify Request Acknowledgement** screen will close and the system will return you to the **My Profile** screen.

#### **F 4.2.1 After Account Profile Modification**

Your modifications will display the next time you login to IACS.

If your modifications do not display after you have logged in to IACS again, please contact the External User Services, EUS, Help Desk at 1-866-484-8049. The TTY/TDD number is 1-866-523-4759. Their hours of operation are Monday-Friday 7am to 7pm Eastern Standard Time EST. They may also be contacted by email at [EUSSupport@cgi.com](mailto:EUSSupport@cgi.com).

Please have your request number from the **Modify Request Acknowledgement** screen available.

## F 5.0 Modify Account Profile

You may need to modify your existing IACS account profile to update your account's user or professional contact information, modify your User Community role, and/or request access to other CMS Applications and User Communities.

This section describes how to modify the **Access Request** information that is in your IACS Account Profile.

**Note:** To see how to modify your **User or Professional Contact Information**, please go to Section F 4.0 in this User Guide Attachment.

**Note:** When modifying your **Access Request** information, you may only request one change to your profile or one additional application access at a time. You can, however, submit one request and immediately re-enter the Modify Account Profile functionality to submit another request.

### F 5.1 Accessing the Modify Account Profile Hyperlink

The following steps and screens show you how to access your account profile in IACS to make the desired modifications.

**Action:** Browse to <https://applications.cms.hhs.gov> on the CMS website.

The **CMS Applications Portal WARNING/REMINDER** screen will display as illustrated in Figure F 38.

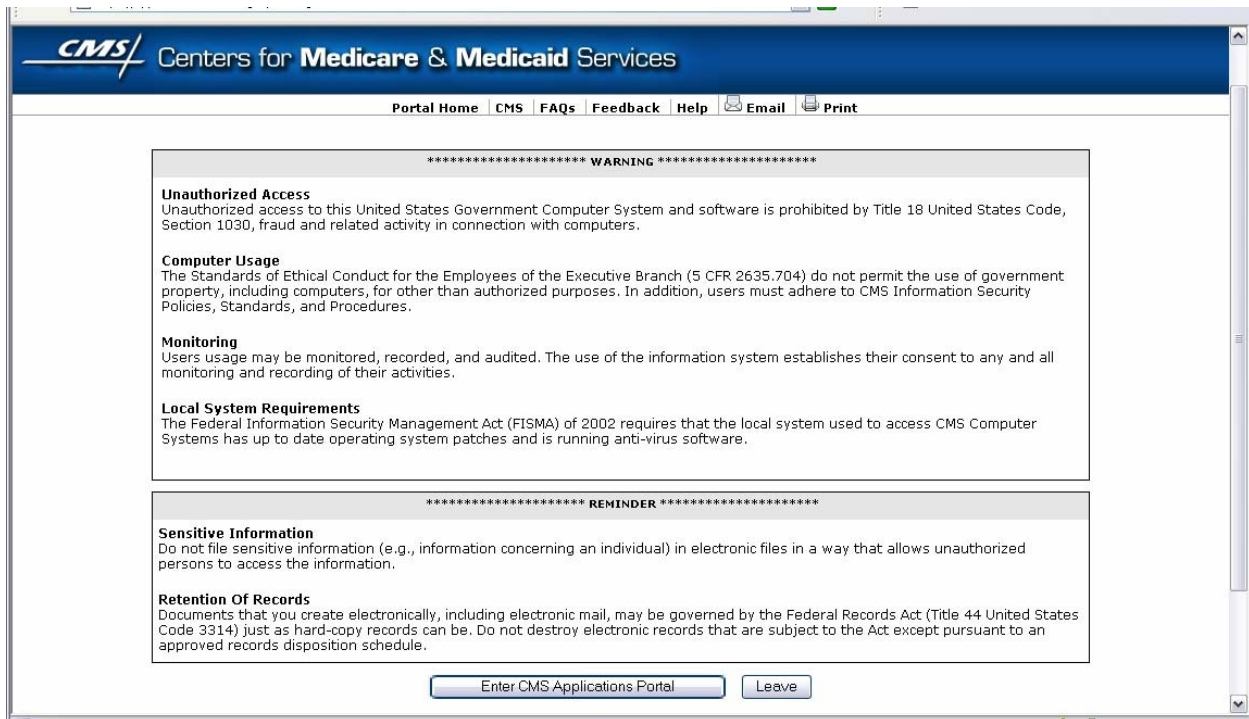


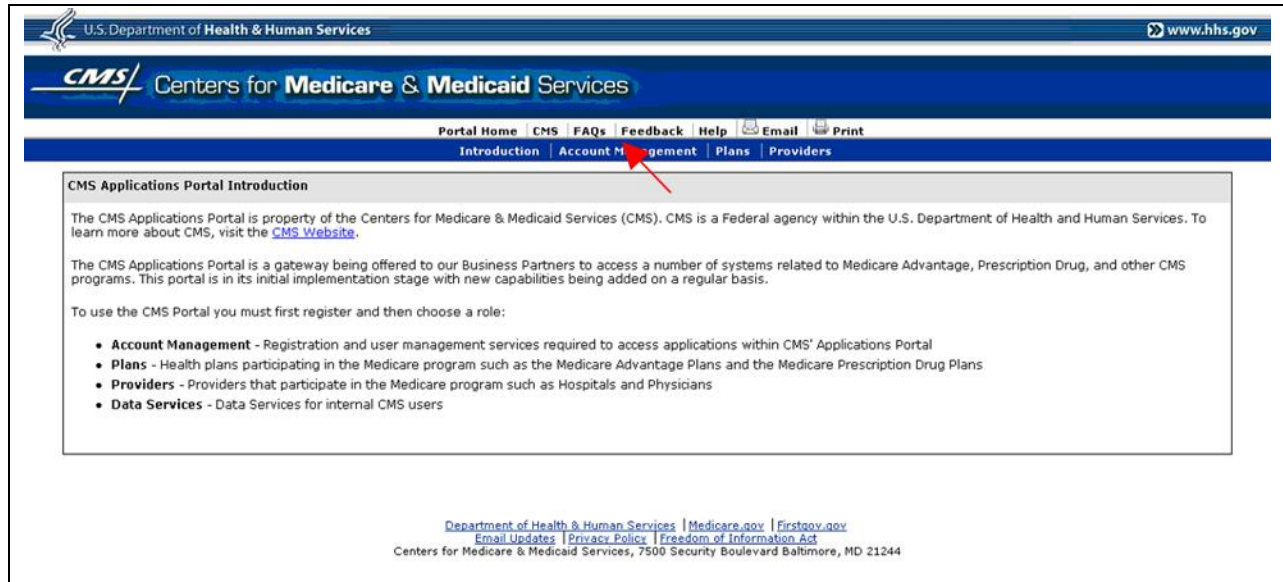
Figure F 38: CMS Applications Portal WARNING/REMINDER Screen

## IACS User Guide Attachment F

**Action:** Read the important information on this screen and indicate your agreement by selecting the **Enter CMS Applications Portal** button.

If you do not want to proceed any further and you want to exit, select the **Leave** button.

The **CMS Applications Portal Introduction** screen will display as illustrated in Figure F 39.



**Figure F 39: CMS Applications Portal Introduction Screen**

**Action:** Select the **Account Management** hyperlink in the menu bar towards the top of the screen.

The **Account Management** screen will display as illustrated in Figure F 40.

## IACS User Guide Attachment F

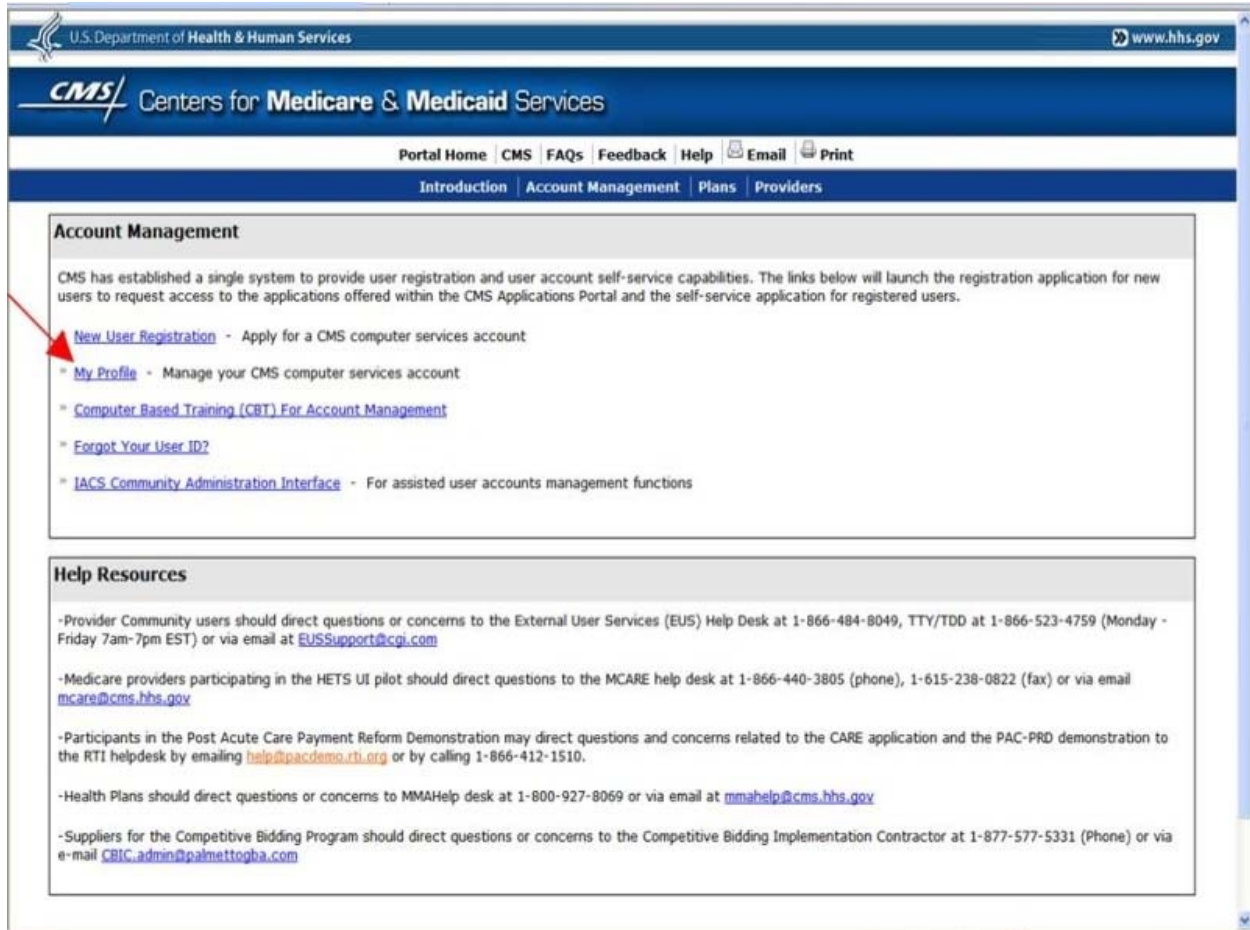


Figure F 40: Account Management Screen

**Action:** Select the ***My Profile*** hyperlink.

**Note:** The bottom portion of the screen labeled ***Help Resources*** provides Help Desk contact information.

The **Login to IACS** screen will display as illustrated in Figure F 41.

U.S. Department of Health & Human Services [www.hhs.gov](http://www.hhs.gov)

**CMS** Centers for **Medicare & Medicaid** Services [HELP](#)

**Individuals Authorized Access to the CMS Computer Services (IACS)**

### Login to IACS

The Federal Information Security Management Act (FISMA) of 2002 requires that the local system used to access CMS Computer Systems has up to date operating system patches and is running anti-virus software.

You must have an IACS User ID and Password to login.  
If this is your first time logging in, please use the User ID and the one-time password that was e-mailed to you by IACS.

Effective September 29, 2006, your password will be set to expire every sixty days. In the event your password does expire, you will be prompted to change your password. For further assistance, contact your CMS help desk.

Enter your User ID and Password, and then click **Login**. If you can't remember your password, click **Forgot Your Password?**

User ID

Password

Figure F 41: Login to IACS Screen

**Action:** Enter your *User ID*

**Action:** Enter your *Password*.

**Action:** Select the *Login* button.

The **My Profile** screen will display as illustrated in Figure F 42. This screen contains the following hyperlinks:

- **Modify User/Contact Information** – Provides access to the IACS functionality that will allow you to request changes to your User and/or Professional Contact Information. For additional information, see Section F 4.0 in this User Guide Attachment.
- **Modify Account Profile** – Provides access to the IACS functionality that will allow you to modify the Access Request information in your IACS Account Profile. These changes could include: adding new or additional access to CMS Applications or User Communities. For additional information, see Section F 5.2, and following, in this User Guide Attachment.
- **Change Answers to Authentication Questions** – Provides access to the IACS functionality that will allow you to change or answer additional authentication questions. For additional information, see the First Time Login to IACS Section in this User Guide Attachment.

## IACS User Guide Attachment F

- **Change Password** – Provides access to the IACS functionality that will allow you change your IACS password. For additional information, see the First Time Login to IACS Section in this User Guide Attachment.

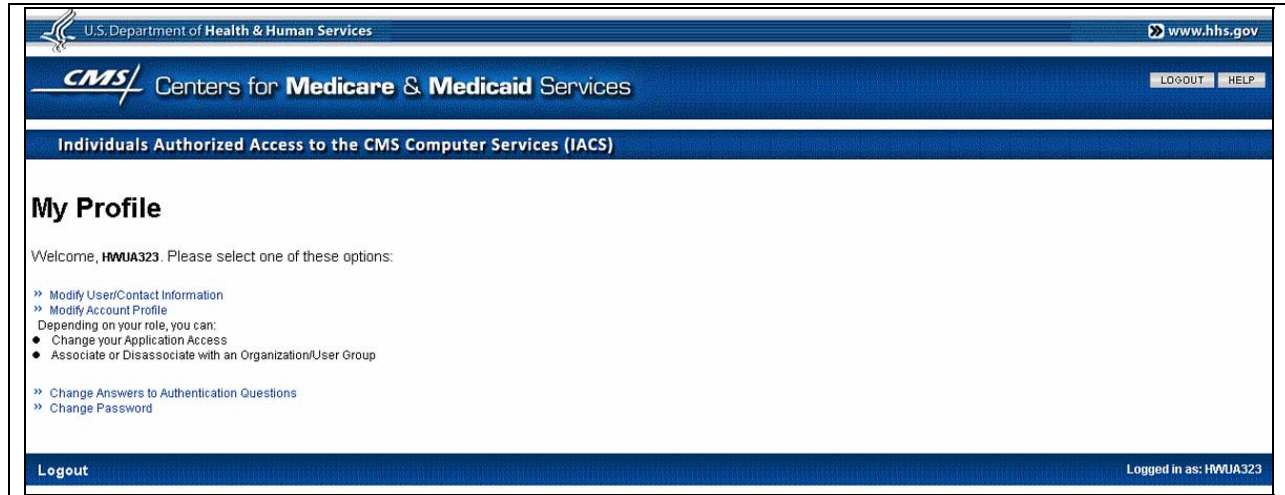


Figure F 42: My Profile Screen

**Action:** Select the **Modify Account Profile** hyperlink and continue to Section F 5.2 below.

The **Modify Account Profile** hyperlink provides you with the capability to request access to CMS Applications integrated with IACS and to modify your role.

### F 5.2 Using the Modify Account Profile Hyperlink

The **Modify Account Profile** hyperlink provides you with information about and options to make modifications to your IACS profile in several ways:

- **View** details pertaining to your IACS **Access Profile**.
- **Request access/Remove access** to CMS applications integrated with IACS.
- **Request access/Remove access** to **other** CMS User Communities integrated with IACS.
- **Modify your role**, or roles if you have multiple roles.



When you select the **Modify Account Profile** hyperlink, the **Modify Account Profile** screen will display and show the information in your account profile that is specific to your role. An example of this is shown in Figure F 43.

In the **Modify Account Profile** screen, the **User Information** and **Professional Contact Information** are displayed but cannot be modified.

In the **Access Request** portion of this screen, the following fields and information are displayed when the screen first displays:

- A *Select Action* field: the **default selection** in this field is **View My Access Profile** which will display the data listed below:
  - **Community/Application: Role** – Your current applications and communities and user role
  - **Profile Summary** – A summary of your IACS account profile and your role within each application or community
  - **Possible Actions** – A listing of actions you can take in each of your approved roles

**Note:** If you have a role in more than one application or community, each application or community will be displayed in a separate row in the table.

Individuals Authorized Access to the CMS Computer Services (IACS)

Modify Account Profile

User Information

User ID: MMSJ984

First Name: Robert \*

MI:

Last Name: Jacobs \*

Date of Birth: 01/01/1980 \*

Valid Date of Birth format is mm/dd/yyyy

E-mail: bjacobs@wess.com \*

Valid E-mail address format is user@internetprovider.domain. Examples of domain: com, net, gov, etc.

Professional Contact Information

Office Telephone: 555-989-2727 \*

Ext:

Valid Telephone Number Format is XXX-XXX-XXXX

Company Name: WESS

Company Telephone:

Ext:

Country: United States \*

Address 1: 212 Rolling Road \*

Address 2:

City: catonsville \*

State/Territory: MD \*

Zip Code: 21228 \* -

Access Request

Select Action: View My Access Profile

Community/Application : Role	Profile Summary	Possible Actions
View My Access Profile : Provider/Supplier : Provider user	<b>Organization / User Group (Role):</b> - / - (Individual Practitioner)	As an Individual Practitioner: <input type="radio"/> Request access to PQRI application  Additionally, you can: <input type="radio"/> Create an Organization profile <input type="radio"/> Associate to an Organization <input type="radio"/> Create a User Group <input type="radio"/> Associate to a User Group

\* Indicates a required field

Cancel

Figure F 43: Modify Account Profile Screen

In the **Access Request** portion of the screen, the *Select Action* field provides a drop-down list of actions you can select from. These are illustrated in the screen in Figure F 44. Possible actions you can select are:

- View My Access Profile** – This is the **default view** which appears when the **Modify Account Profile** screen first opens. This default view allows you to view your existing IACS profile with all your roles displaying and provides a brief summary specific to each role. If this is the action you want, it will display when the **Modify Account Profile** screen opens. There is additional information on the screen display in Section F-5.2.1 in this User Guide Attachment.
- Modify Provider/Supplier Profile** – Allows you to modify your Provider/Supplier access profile. These modifications all fall **within the Provider Community**. Select this to perform any of the actions available, such as those listed below:



- **Request access/Remove access to** available **Provider/Supplier Community** Applications integrated with IACS.
- **Organization Modifications**
  - **Create** a new Organization
  - **Associate** to an Organization
  - **Disassociate** from an Organization.
- **User Group Modifications**
  - **Create** a new User Group
  - **Associate** to a User Group
  - **Disassociate** from a User Group.
- **Add Application** – Allows you to request access to a role in a CMS Application integrated with IACS. This modification will be made **outside the Provider/Supplier Community**. You can only request access to a role in one application at a time.
- **Add Community** – Allows you to request access to a role in a CMS User Community. This modification will be made **outside the Provider/Supplier Community**. . You can only request access to one community role at a time.

**Access Request**

Select Action: View My Access Profile

View My Access Profile: Provider/Supplier : Provider user

**Profile Summary**

Organization / User Group (Role):  
Hamilton Labs / - (Security Official)  
- / - (PQRI User)  
- / - (Individual Practitioner)

**Possible Actions**

As a Security Official:

- View/Edit Organization details

As an Individual Practitioner:

- Request access to PQRI application

Additionally, you can:

- Create an Organization profile
- Associate to an Organization
- Create a User Group
- Associate to a User Group

\* indicates a required field

Cancel

**Figure F 44: Modify Account Profile Select Action Drop-down List**

**Action:** Select the **Action** you want to take from the drop-down list in the *Select Action* field.

Detailed explanations of each action are provided in the following subsections.

### F-5.2.1 View My Access Profile

If you select the action, **View My Access Profile**, the screen will refresh and you will be presented with a screen where the **Access Request** portion is similar to the one shown in Figure F 43. In the **Access Request** portion of the screen, all the applications and user communities to which you are approved for access are listed in the **View My Access Profile** table. There are **no actions** for you to take with this selection.

**Note:** This is the **default** view that appears when the **Modify Account Profile** screen first opens. If the first action you select in the **Select Action** field drop-down list is the **View My Access Profile** action, there will be no change in the screen.

**Access Request**

Select Action: View My Access Profile

Community/Application : Role	Profile Summary	Possible Actions
View My Access Profile : Provider/Supplier : Provider user	Organization / User Group (Role): - / - (Individual Practitioner)	As an Individual Practitioner: <input type="radio"/> Request access to PQRI application  Additionally, you can: <input type="radio"/> Create an Organization profile <input type="radio"/> Associate to an Organization <input type="radio"/> Create a User Group <input type="radio"/> Associate to a User Group

\* indicates a required field

Cancel

Figure F 45: View My Access Profile

**Action:** Review the information displayed in the table and **select another action** in the **Select Action** field drop-down list, or select the **Cancel** button to exit and return to the **My Profile** screen.

If you have recently submitted a Modify Account Profile update request and the request is still awaiting approval, a **Pending Requests** table will display immediately below the **Access Request** label showing update requests you have submitted that are still awaiting approval. An example of this table is illustrated in Figure F 46.

## IACS User Guide Attachment F

**Access Request**

Pending Requests:

Application	Request Number	Role	Type of Request
Provider/Supplier	REQ-1217427895667-MODIFY	Security Official	Modify Application/Community

Select Action: View My Access Profile

Community/Application : Role	Profile Summary	Possible Actions
View My Access Profile : Provider/Supplier : Provider user	Organization / User Group (Role): - / - (Individual Practitioner)	As an Individual Practitioner: <ul style="list-style-type: none"><li>Request access to PQRI application</li></ul> Additionally, you can: <ul style="list-style-type: none"><li>Create an Organization profile</li><li>Associate to an Organization</li><li>Create a User Group</li><li>Associate to a User Group</li></ul>

\* Indicates a required field

Cancel

**Figure F 46: Pending Requests Table**

**Action:** Review the information displayed in the table and ***select another action*** in the ***Select Action*** field drop-down list, or select the ***Cancel*** button to exit and return to the **My Profile** screen.

### F-5.2.2 Modify Provider/Supplier Profile

If you select the action, **Modify Provider/Supplier Profile**, the screen will refresh and you will be presented with a screen where the **Access Request** portion is similar to the one shown in Figure F 47.

**Access Request**

Select Action: **Modify Provider/Supplier Profile**

Community Type: **Provider/Supplier**

My Current Access Profile:	Organization	User Group	Role Type	Role	Action
	Not Applicable	Not Applicable	Community	Individual Practitioner	

Additional Access Request(s):

Justification for Action:

\* Indicates a required field

Next Cancel

**Figure F 47: My Current Access Profile Area and Additional Access Requests Field**

In the **Access Request** portion of the screen, a **My Current Access Profile** table will display your access profile information that will be expanded to show the following:

- The **Organization** with which you are associated
- The **User Group** with which you are associated
- Your **Role Type**
- Your **Role** within your Role Type
- An **Action** field that indicates there is a drop-down list, although the default view in this field is blank.

The drop-down list of actions that you can select in the **Action** field depends on modifications you may have previously made to your IACS account profile.

If the only role you have showing in this table is that of **Individual Practitioner**, The **Organization** and **User Group** fields will show **Not Applicable** because your role belongs to the Provider/Supplier Community. Also, if you do not have any CMS application roles, the only action currently available is:

- **Request Access to Application** – This action *currently* enables you to request access, as a User, to the Physician Quality Reporting Initiative, **PQRI**, Application as illustrated in Figure F 48. Details on requesting access are provided in Section F-5.2.2.1 in this Attachment. Additional details on removing access, once you have an application role, are provided in Section F-5.2.2.2 in this Attachment.

An **Additional Access Requests** field and a **Justification for Action** field are also displayed.

The drop-down list of actions in the *Additional Access Requests* field is briefly described below. More details and instructions on how to complete these actions are available in the IACS User Guide Attachment G.

- **Create a new User Group** – This action will require you to assume the role of User Group Administrator as you create a User Group within an existing IACS Organization. Details on this role, its functions and responsibilities are in the **Request to Create a New User Group Section** in the IACS User Guide Attachment G.
- **Associate to a User Group as an Administrator** – This action will require you to assume the role of User Group Administrator as you associate to a User Group within an existing IACS Organization. Details on this role, its functions and responsibilities are in the **Request to Associate to a User Group as Administrator Section** in the IACS User Guide Attachment G.
- **Associate to a User Group as an End User** – This action will require you to assume the role of End User for an existing User Group within an IACS Organization. Details on this role, its functions and responsibilities are in the **Request to Associate to a User Group as End User Section** in the IACS User Guide Attachment G.
- **Create a new Organization** – This action will require you to assume the role of Security Official as you create an IACS Organization. Details on this role, its functions and responsibilities are in the **Create a New Organization Section** in the IACS User Guide Attachment G.
- **Associate to an Organization as a Backup Security Official** – This action will require you to assume the role of Backup Security Official for an existing IACS Organization. Details on this role, its functions and responsibilities are in the **Request to Associate to an Organization as a Backup Security Official Section** in the IACS User Guide Attachment G.

### F-5.2.2.1 Request Access to Provider/Supplier Application

**Note:** At the time this user guide was last updated, the only CMS Provider/Supplier application integrated with IACS is the Physician Quality Reporting Initiative, PQRI, application. Examples in this section relate only to requesting access to PQRI.

Selecting this action *currently* enables you to request access, as a User, to the Physician Quality Reporting Initiative, **PQRI**, application.

The screenshot shows the 'Access Request' form. At the top, there is a 'Select Action' dropdown menu set to 'Modify Provider Profile'. Below this, the 'Community Type' is set to 'Provider/Supplier'. The 'My Current Access Profile' table is displayed with the following data:

Organization	User Group	Role Type	Role	Action
Not Applicable	Not Applicable	Community	Individual Practitioner	Request Access to Application

Below the table, there is an 'Additional Access Request(s)' dropdown menu. To the right of the table, there is a 'Justification for Action' text area with a '\*' icon indicating a required field. At the bottom left, there are 'Next' and 'Cancel' buttons. At the bottom right, there is a footer with 'OMB: 0938-0989', 'Effective date 5/06', 'Logout', and 'Logged in as: DOTJ718'.

**Figure F 48: My Current Access Profile, Action Field Drop-down List**

**Action:** Select the **Request Access to Application** action from the drop-down list in the **Action** field of the **My Current Access Profile** table.

When you select the **Request Access to Application** action, the screen will refresh and display an **Access to Applications** section with a **Select Application** field. This field contains a drop-down list of applications you may select as illustrated in Figure F 49.

### Access Request

Select Action :
Modify Provider/Supplier Profile

Community Type:
Provider/Supplier

My Current Access Profile:

Organization	User Group	Role Type	Role	Action
Not Applicable	Not Applicable	Community	Individual Practitioner	Request Access to Application

Additional Access Request(s):

### Access to Applications

Request Access to Application for Individual Practitioner

Select Application:

PQRI (PQRI Application)

Justification for Action:

\* indicates a required field

Next
Cancel

**Figure F 49: Access to Applications, Select Application Drop-down List**

**Action:** Select the desired application from the *Select Application* field drop-down list.

If you select the **PQRI (PQRI Application)** action, the screen will refresh and display a *Role* field that contains the role of **PQRI User** as illustrated in Figure F 50.

## IACS User Guide Attachment F

**Access Request**

Select Action :
Modify Provider/Supplier Profile

Community Type:
Provider/Supplier

My Current Access Profile:

Organization	User Group	Role Type	Role	Action
Not Applicable	Not Applicable	Community	Individual Practitioner	Request Access to Application

Additional Access Request(s):

**Access to Applications**

Request Access to Application for Individual Practitioner

Select Application:
PQRI (PQRI Application)

Select Role:
PQRI User

Justification for Action:

To monitor quality initiative.

\* indicates a required field

Next
Cancel

**Figure F 50: Modify Account Profile, Justification for Action**

Complete the **Modify Account Profile** process by performing the following actions:

**Action:** Enter a brief justification statement for the modification in the *Justification for Action* field. This justification field must include the reason you are requesting this action.

**Note:** In the **PQRI** application, the only role available for an Individual Practitioner is the **PQRI User** role, which will be pre-selected for you in *Role* field.

**Action:** Select the **Next** button when you have completed your justification statement.

When you select the Next button, the system will display the **Modify Request Confirmation** screen as illustrated in Figure F 51.



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### Modify Request Confirmation

You made changes to your profile.

To submit your request please click **Submit** button.  
If you want to edit your changes please click **Edit** Button.  
If you want to cancel the changes, which you made please click **Cancel** button

**Submit** **Edit** **Cancel**

OMB: 0938-0989

[Logout](#)

Figure F 51: Modify Request Confirmation Screen

**Action:** Select the **Submit** button to submit your modification request.

**Note:** Your modifications will not be completed unless the **Submit** button is selected.

- Select the **Edit** button to return and edit your changes.
- If you select the **Cancel** button, your request will be cancelled and any modifications you entered will be lost. A screen indicating this will be displayed.

When you select the **Submit** button, a **Modification Request Acknowledgement** screen will display as illustrated in Figure F 52. You must select the **OK** button to complete your account profile modification.

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LOGOUT HELP

**Individuals Authorized Access to the CMS Computer Services (IACS)**

**Modification Request Acknowledgement**

Thank you for your request to modify registration.  
The tracking number for your request is: **REQ-1214411452843**

Print

Please use this number in all correspondences concerning this request.  
You will be notified via e-mail once your request has been processed.

Contact your Help Desk if you need further assistance.  
Your Help Desk contact information is listed in the "Help Resources" portion  
of the Account Management page in the CMS Applications Portal.

OK

OMB: 0938-0989 Effective date: 5/06

Logout Logged in as: AVKU632

**Figure F 52: Modify Request Acknowledgement Screen**

The **Modify Request Acknowledgement** screen indicates your request has been successfully submitted and provides a tracking number for your request. ***Record this tracking number*** and use it if you have questions about the status of your request.

**Note:** You can print the information contained on the screen by selecting the **Print** icon.

**Action:** Select the **OK** button to complete the Modify Account Profile process.

The **Modify Request Acknowledgement** screen will close and the system will return you to the **My Profile** screen.

#### **F 5.2.2.1.1 After Account Profile Modification**

You will be sent an email confirming that IACS has received your request and providing you with a Request Number. You should use that request number if you contact your Help Desk regarding your request.

If an email notification is not received within 24 hours after you modify your profile, please contact the External User Services, EUS, Help Desk at 1-866-484-8049. The TTY/TDD number is 1-866-523-4759. Their hours of operation are Monday-Friday 7am to 7pm Eastern Standard Time EST. They may also be contacted by email at [EUSsupport@cgi.com](mailto:EUSsupport@cgi.com).

Please have your request number from the **Modify Request Acknowledgement** screen available.

### F-5.2.2.2 Remove Access from Provider/Supplier Application

**Note:** At the time this user guide was last updated, the only CMS Provider/Supplier application integrated with IACS is the Physician Quality Reporting Initiative, PQRI, application. Examples in this section relate only to removing access to PQRI.

After you have been granted access to the PQRI Application, the **Access Request** portion of your IACS Account Profile will display that information as illustrated in Figure F 53.

**Access Request**

Select Action: Modify Provider/Supplier Profile

Community Type: Provider/Supplier

Organization	User Group	Role Type	Role	Action
Not Applicable	Not Applicable	Application	PQRI User	<span></span>
Not Applicable	Not Applicable	Community	Individual Practitioner	<span></span>

Additional Access Request(s):

Justification for Action:

\* indicates a required field

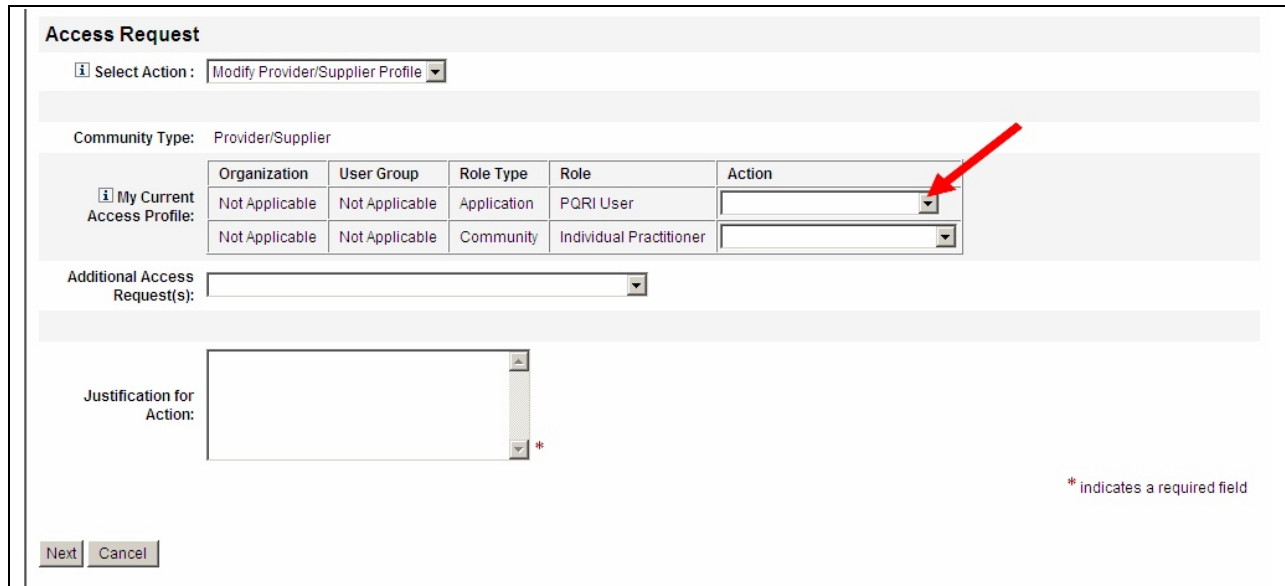
Next Cancel

**Figure F 53: My Current Access Profile Showing PQRI User Role**

**Action:** Select the **Modify Provider/Supplier Profile** action from the *Select Action* field drop-down list.

When you select the **Modify Provider/Supplier Profile** action from the *Select Action* field drop-down list, the screen will refresh and display the **My Current Access Profile** table with your PQRI User role as illustrated in Figure F 54.

## IACS User Guide Attachment F



**Access Request**

Select Action: Modify Provider/Supplier Profile

Community Type: Provider/Supplier

	Organization	User Group	Role Type	Role	Action
My Current Access Profile:	Not Applicable	Not Applicable	Application	PQRI User	<span></span>
	Not Applicable	Not Applicable	Community	Individual Practitioner	<span></span>

Additional Access Request(s):

Justification for Action:  \*

\* indicates a required field

Next Cancel

**Figure F 54: Removing Access to PQRI Application – Select Action**

**Action:** Select the ***Remove Access from PQRI*** action from the *Action* field drop-down list in the PQRI User role.

When you select the ***Remove Access from PQRI*** action, the screen will refresh and a confirmation message and check box will appear above the *Justification for Action* field as illustrated in Figure F 54.

## IACS User Guide Attachment F

**Access Request**

Select Action: **Modify Provider/Supplier Profile**

Community Type: **Provider/Supplier**

Organization	User Group	Role Type	Role	Action
Not Applicable	Not Applicable	Application	PQRI User	<b>Remove Access from: PQRI</b>
Not Applicable	Not Applicable	Community	Individual Practitioner	

Additional Access Request(s):

Confirm Action: ☒ \* I confirm that I wish to remove myself from the role of **PQRI User**

Justification for Action:

\* indicates a required field

**Next** **Cancel**

**Figure F 55: Removing Access to PQRI Application – Confirm and Justify Action**

Complete the **Modify Provider/Supplier Profile** process by performing the following actions:

- Action:** Select the **Check Box** to confirm that you want to remove yourself from the PQRI User role.
- Action:** Enter a brief justification statement for the modification in the *Justification for Action* field. This justification field must include the reason you are requesting this action.
- Action:** Select the **Next** button when you have completed your justification statement.

When you select the Next button, the system will display the **Modify Request Confirmation** screen as illustrated in Figure F 56.

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Individuals Authorized Access to the CMS Computer Services (IACS)

## Modify Request Confirmation

You made changes to your profile.

To submit your request please click **Submit** button.  
 If you want to edit your changes please click **Edit** Button.  
 If you want to cancel the changes, which you made please click **Cancel** button

OMB: 0938-0989

[Logout](#)

Figure F 56: Modify Request Confirmation Screen

**Action:** Select the **Submit** button to submit your modification request.

**Note:** Your modifications will not be completed unless the **Submit** button is selected.

- Select the **Edit** button to return and edit your changes.
- If you select the **Cancel** button, your request will be cancelled and any modifications you entered will be lost. A screen indicating this will be displayed.

When you select the **Submit** button, a **Modification Request Acknowledgement** screen will display as illustrated in Figure F 57. You must select the **OK** button to complete your account profile modification.

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LOGOUT HELP

**Individuals Authorized Access to the CMS Computer Services (IACS)**

**Modification Request Acknowledgement**

Thank you for your request to modify registration.  
The tracking number for your request is: REQ-1214411452843

Print

Please use this number in all correspondences concerning this request.  
You will be notified via e-mail once your request has been processed.

Contact your Help Desk if you need further assistance.  
Your Help Desk contact information is listed in the "Help Resources" portion  
of the Account Management page in the CMS Applications Portal.

OK

OMB: 0938-0989

Effective date  
5/06

Logout

Logged in as: AVWKU632

Figure F 57: Modify Request Acknowledgement Screen

The **Modify Request Acknowledgement** screen indicates your request has been successfully submitted and provides a tracking number for your request. **Record this tracking number** and use it if you have questions about the status of your request.

**Note:** You can print the information contained on the screen by selecting the **Print** icon.

**Action:** Select the **OK** button to complete the Modify Account Profile process.

The **Modify Request Acknowledgement** screen will close and the system will return you to the **My Profile** screen.

#### F 5.2.2.2.1 After Account Profile Modification

You will be sent an email confirming that IACS has received your request and providing you with a Request Number. You should use that request number if you contact your Help Desk regarding your request.

If an email notification is not received within 24 hours after you modify your profile, please contact the External User Services (EUS) Help Desk at 1-866-484-8049. The TTY/TDD number is 1-866-523-4759. Their hours of operation are Monday-Friday 7am to 7pm Eastern Standard Time EST. They may also be contacted by email at [EUSupport@cgi.com](mailto:EUSupport@cgi.com).

Please have your request number from the **Modify Request Acknowledgement** screen available.



### F-5.2.3 Add Application

If you select the action, **Add Application**, the screen will refresh and you will be presented with a screen where the **Access Request** portion is similar to the one shown Figure F 58.

The screenshot shows the 'Access Request' form. At the top, there is a 'Select Action:' dropdown menu with 'Add Application' selected. Below it is a 'Select Application:' dropdown menu with 'Select Application' as the placeholder text. A red asterisk with the text '\* indicates a required field' is positioned to the right of the 'Select Application' dropdown. On the left side, there is a 'Cancel' button. At the bottom left, there is a text field containing 'OMB: 0938-0989'. At the bottom right, there is a text field containing 'Effective date: 5/08'. The footer of the form is a blue bar with 'Logout' on the left and 'Logged in as: 00002313' on the right.

Figure F 58: Modify Account Profile Select Application Field

The *Select Application* field contains a drop-down list of the CMS applications integrated with IACS as illustrated in Figure F 59.

The screenshot shows the 'Access Request' form with the 'Select Application' dropdown menu open. The dropdown list contains the following items: 'Select Application', 'MAMA-PD/PDP/CC', 'CBO/CSR', 'COB', and 'HETS UI'. A red asterisk with the text '\* indicates a required field' is positioned to the right of the dropdown. Below the dropdown, there is a 'Justification for Action:' text field. On the left side, there are 'Next' and 'Cancel' buttons. At the bottom left, there is a text field containing 'OMB: 0938-0989'. At the bottom right, there is a text field containing 'Effective date: 5/08'. The footer of the form is a blue bar with 'Logout' on the left and 'Logged in as: nick123' on the right.

Figure F 59: Modify Account Profile Select Application Drop-down List

**Action:** Select the desired **Application** from the drop-down list.



Please refer to the procedures for requesting access to the various CMS applications, using the Modify Account Profile option, which are provided in the following IACS help document attachments:

- **Attachment A – MA/MA-PD/PDP/CC** – Medicare Advantage/Medicare Advantage-Prescription Drug/Prescription Drug Plan/Cost Contracts
- **Attachment B – CBO/CSR** – Community Based Organization/Customer Service Representative
- **Attachment C – COB** – Coordination of Benefits – VDSA and COBA Organizations
- **Attachment D – HETS-UI** – HIPPA Eligibility Transaction System User Interface

#### F-5.2.4 Add Community

If you select the action, **Add Community**, the screen will refresh and you will be presented with a screen where the **Access Request** portion is similar to the one shown in Figure F 60.

The screenshot displays the 'Access Request' form. At the top, there is a 'Select Action' dropdown menu with 'Add Community' selected. Below this is a 'Select Community' dropdown menu, which is marked with an asterisk (\*) indicating it is a required field. To the right of the 'Select Community' dropdown is a text area labeled 'Justification for Action:', also marked with an asterisk (\*). Below the text area are 'Next' and 'Cancel' buttons. At the bottom left, there is a 'Logout' button. At the bottom right, there is a 'Effective date' field showing '5/08' and a 'Logged in as: DBER937' status bar.

Figure F 60: Modify Account Profile Select Community Field

The *Select Community* field contains a drop-down list of the other CMS communities integrated with IACS as illustrated in Figure F 61.

**Note:** The community names shown on the drop-down list may vary depending on the number of CMS communities integrated with IACS and your current access profile. Only those communities not already in your profile will be displayed.

The screenshot displays the 'Access Request' form. At the top, there is a 'Select Action' dropdown menu with 'Add Community' selected. Below this is the 'Select Community' field, which is a dropdown menu with a red asterisk indicating it is a required field. The dropdown list is open, showing three options: 'Select Community', 'FI/Carrier/MAC', and 'DMEPOS'. To the right of the dropdown, a note states '\* indicates a required field'. Below the dropdown are 'Next' and 'Cancel' buttons. At the bottom left, there is a text box containing 'OMB: 0938-0989'. At the bottom right, there is a text box containing 'Effective date: 5/08'. The footer of the form includes a 'Logout' button on the left and 'Logged in as: MMSJ064' on the right.

Figure F 61: Example of the Modify Account Profile Select Community Drop-down List

**Action:** Select the desired **Community** from the *Select Community* field drop-down list.

Please refer to the procedures for requesting access to the various CMS communities, using the Modify Account Profile option, which are provided in the following IACS help document attachment:

- **Attachment E – DMEPOS Community**
- **Attachment G – Provider/Supplier and FI/Carrier/MAC Communities**

## F 6.0 Additional IACS Procedures

### F 6.1 *Forgot Your Password?*

When you want to login to IACS, you are required to enter your User ID and Password on the **Login to IACS** screen which is illustrated in Figure F 62. If, however, you have forgotten your password, you can follow the actions listed below.

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HELP

**Individuals Authorized Access to the CMS Computer Services (IACS)**

**Login to IACS**

The Federal Information Security Management Act (FISMA) of 2002 requires that the local system used to access CMS Computer Systems has up to date operating system patches and is running anti-virus software.

You must have an IACS User ID and Password to login.  
If this is your first time logging in, please use the User ID and the one-time password that was e-mailed to you by IACS.

Effective September 29, 2006, your password will be set to expire every sixty days. In the event your password does expire, you will be prompted to change your password. For further assistance, contact your CMS help desk.

Enter your User ID and Password, and then click **Login**. If you can't remember your password, click **Forgot Your Password?**

User ID

Password

Login Forgot Your Password?

Figure F 62: Login to IACS Screen

**Action:** Enter your **User ID**.

Try to remember your password and only use the ***Forgot Your Password?*** button if you have actually forgotten your password and cannot remember it. This feature will result in a reset of your password and issue you with a temporary, one-time password, which you must change when you login the next time.

**Action:** Select the ***Forgot Your Password?*** button if you have forgotten your Password.

**Note:** Your account will be locked if you incorrectly enter your password three times within a 30 minute timeframe. You must wait 60 minutes before you can try to login again. Alternatively, you can call your Help Desk to have them unlock your account.

A **Security Questions** screen will display as illustrated in Figure F 63.

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**Individuals Authorized Access to the CMS Computer Services (IACS)**

**Security Questions**

Please answer the following questions.

Last 4 digits of SSN:  \* Please enter valid last 4 digits of your SSN

E-mail:  \* Valid E-mail address format is user@internetprovider.domain. Examples of domain: com, net, gov, etc.

\* indicates a required field

Next Cancel

OMB: 0938-0989

Effective date: 5/06

Logout

Logged in as: New User

Figure F 63: Security Questions Screen

**Action:** Enter the last four digits of your **Social Security Number** in the field provided.

**Action:** Enter your **email address** in the field provided.

**Note:** The answer fields for the security questions are **not case sensitive**.

**Action:** Select the **Next** button.

When you select the **Next** button, a **Forgot Your Password?** screen will display as illustrated in Figure F 64. Answer fields for the authentication questions you answered during your initial login will be displayed. You must answer correctly at least two of the questions. If you incorrectly answer the questions three times in a row, your account will be locked. You must wait 60 minutes before you can try again. Alternatively, you can call your Help Desk to have them unlock your account.

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LOGOUT HELP

**Individuals Authorized Access to the CMS Computer Services (IACS)**

**Forgot Your Password?**

If you have forgotten your password, IACS must reset your password and issue you a new, one-time password. Please answer at least (2) of the following questions to request that your password be reset (answers are not case-sensitive), and click 'Login'.

What city were you born in?

What was the make of your first car?

Next Cancel

OMB: 0938-0989

Effective date: 5/06

Logout

Logged in as: New User

**Figure F 64: Forgot Your Password? Screen**

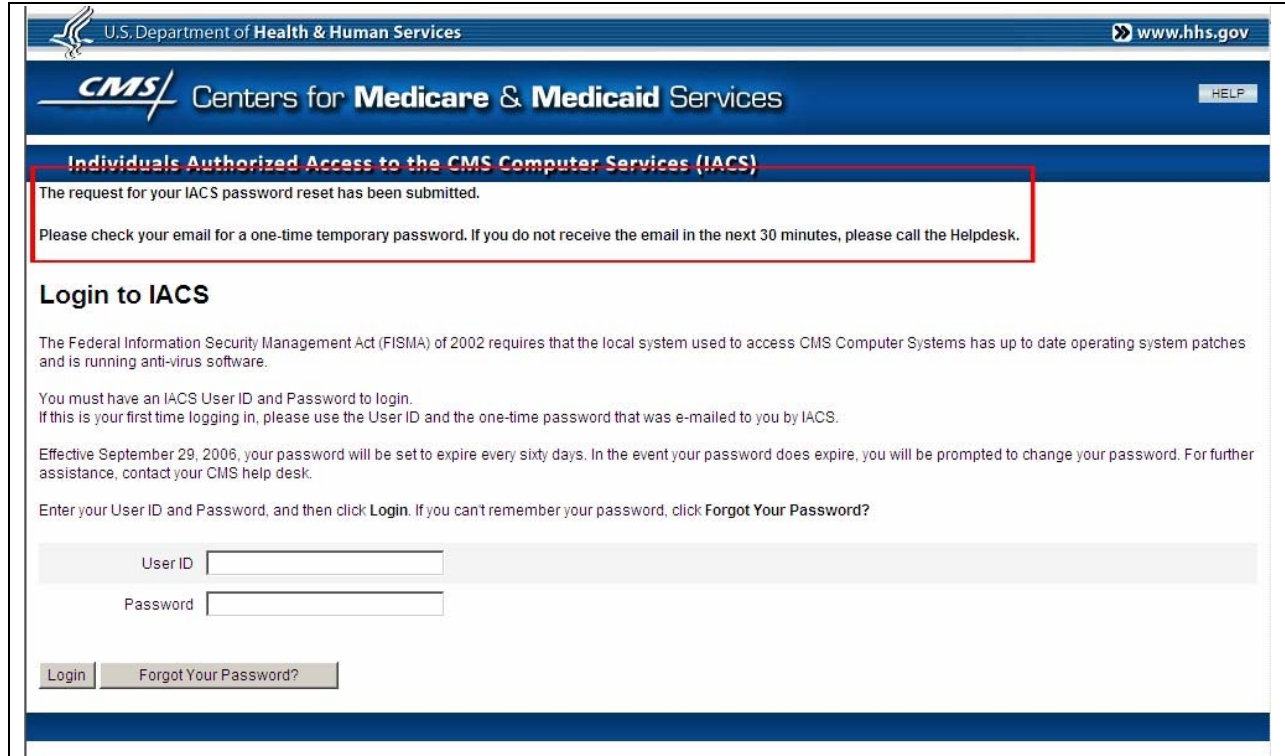
**Action:** Answer each question with the exact answer provided previously.

**Note:** The answer fields for the authentication questions are ***not case sensitive***.

**Action:** Select the ***Login*** button.

The **Login to IACS** screen will display again with a message above the *User ID* field indicating that a temporary, one-time password has been emailed to you. This is illustrated in Figure F 65. This email notification contains a temporary, one-time password.

## IACS User Guide Attachment F



The screenshot shows the IACS (Individuals Authorized Access to the CMS Computer Services) login page. At the top, there is a header for the U.S. Department of Health & Human Services and the CMS logo. Below the header, a red box highlights a message: "The request for your IACS password reset has been submitted. Please check your email for a one-time temporary password. If you do not receive the email in the next 30 minutes, please call the Helpdesk." Below this message, there is a "Login to IACS" section. It contains a paragraph about the FISMA 2002 requirements, a note about the need for a User ID and Password, and a note about password expiration. At the bottom of this section, there are input fields for "User ID" and "Password", and two buttons: "Login" and "Forgot Your Password?".

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**Individuals Authorized Access to the CMS Computer Services (IACS)**

The request for your IACS password reset has been submitted.

Please check your email for a one-time temporary password. If you do not receive the email in the next 30 minutes, please call the Helpdesk.

**Login to IACS**

The Federal Information Security Management Act (FISMA) of 2002 requires that the local system used to access CMS Computer Systems has up to date operating system patches and is running anti-virus software.

You must have an IACS User ID and Password to login.  
If this is your first time logging in, please use the User ID and the one-time password that was e-mailed to you by IACS.

Effective September 29, 2006, your password will be set to expire every sixty days. In the event your password does expire, you will be prompted to change your password. For further assistance, contact your CMS help desk.

Enter your User ID and Password, and then click **Login**. If you can't remember your password, click **Forgot Your Password?**

User ID

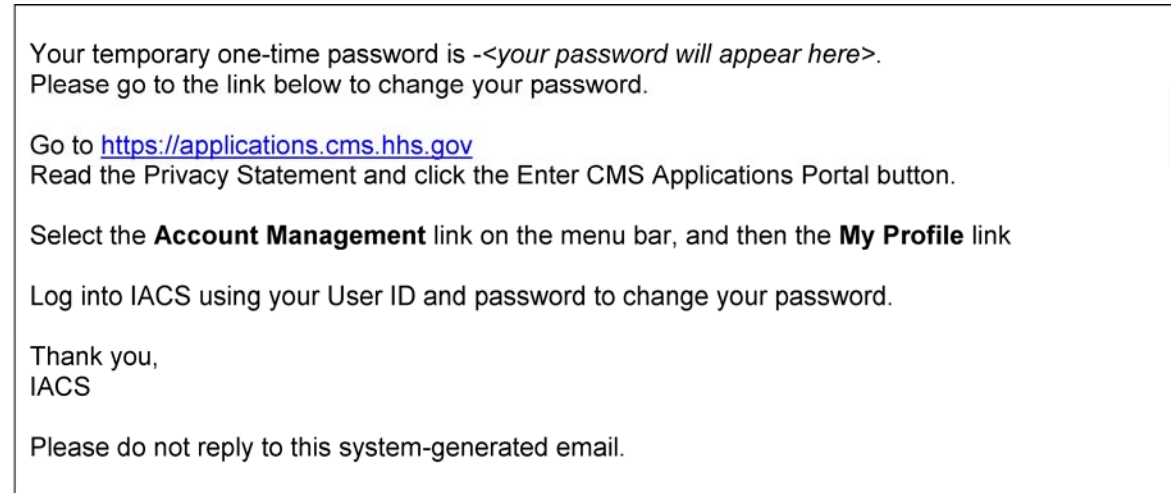
Password

**Figure F 65: Password Email Notification Screen**

**Action:** Go to your email and get your new password. This will be a temporary, one-time password that you must change next time you log in.

**Note:** The email subject line will be: **FYI: User Creation Completed – Password Enclosed.**

Figure F 66 illustrates a sample password notification email that you would receive.



**Figure F 66: Example: Password Notification Email**

**Note:** If you do not receive this email notification within 24 hours, please contact the External User Services (EUS) Help Desk at 1-866-484-8049. The TTY/TDD number is 1-866-523-4759. Their hours of operation are Monday-Friday 7am to 7pm Eastern Standard Time EST. They may also be contacted by email at [EUSSupport@cgi.com](mailto:EUSSupport@cgi.com).

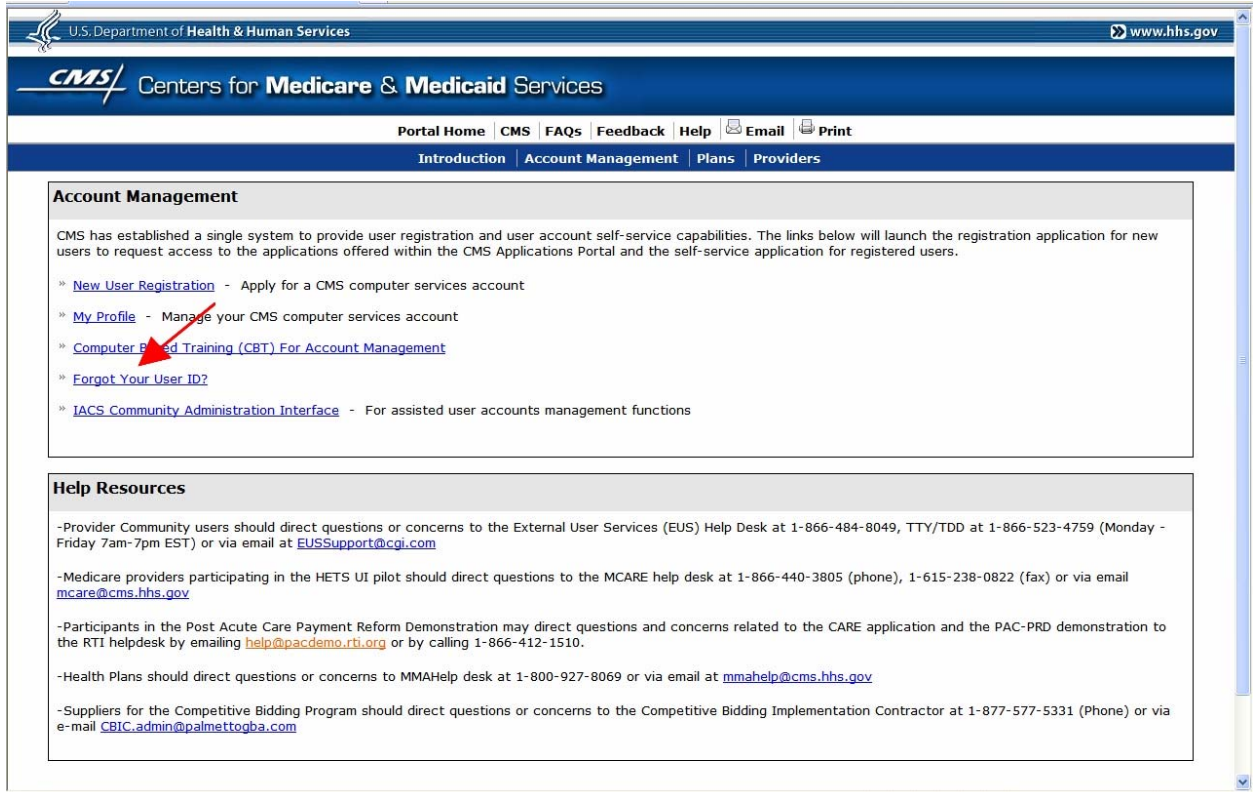
**Action:** Go to Section F 3.0, and follow the steps for logging in and changing your password. You do not have to answer the authentication questions again unless you want to change your answers.

### **F 6.2 Forgot Your User ID?**

When you login to IACS, you are required to enter your User ID and Password. If you have forgotten your User ID you can select the ***Forgot Your User ID?*** hyperlink on the **Account Management** screen as illustrated in Figure F 67.



## IACS User Guide Attachment F



**Figure F 67: Account Management Screen: Forgot Your User ID?**

**Action:** Select the ***Forgot Your User ID?*** hyperlink.

The **Forgot Your User ID?** screen will display as illustrated in Figure F 68.

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Individuals Authorized Access to the CMS Computer Services (IACS)

## Forgot Your User ID?

Please enter the following information and your User ID will be emailed to you after your account is validated:

First Name \*

Last Name \*

Date of Birth \* ( mm/dd/yyyy )

Social Security Number \* Valid SSN Format is XXX-XX-XXXX

Email \*

Figure F 68: Forgot Your User ID? Screen

**Action:** You must complete correctly the following **required fields**:

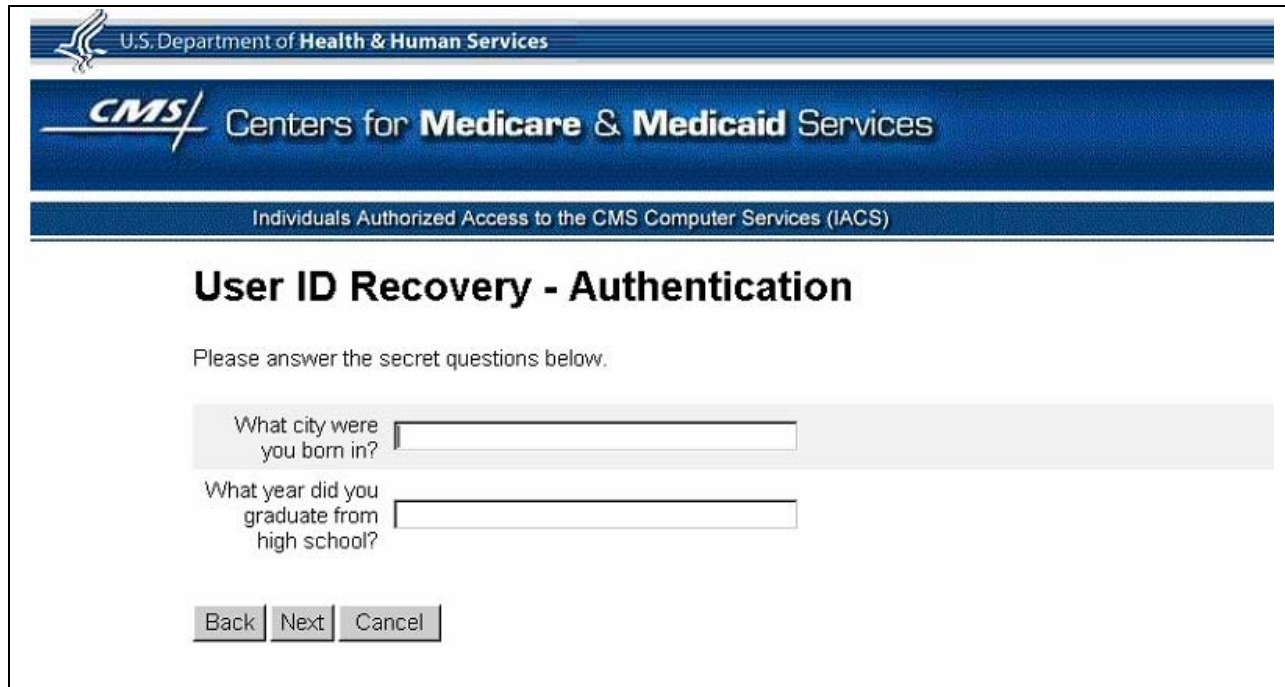
1. *First Name*
2. *Last Name*
3. *Date of Birth*
4. *Social Security Number*
5. *Email (address)*

**Note:** The data you enter must match the information that currently exists in your IACS user account profile.

**Action:** Select the **Next** button when you are done.

The **User ID Recovery - Authentication** screen will display as illustrated in Figure F 69. This screen will display authentication questions you answered during your initial login. You must provide correct answers to the authentication questions displayed.

If you incorrectly answer the questions three times in a row, your account will be locked. You must wait 60 minutes before you can try again. Alternatively, you can call your Help Desk to have them unlock your account. For help desk contact information, see Section F 7.5.



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## User ID Recovery - Authentication

Please answer the secret questions below.

What city were you born in?

What year did you graduate from high school?

**Figure F 69: User ID Recovery - Authentication Screen**

**Action:** Answer each question that is displayed with the exact answer you provided previously.

**Action:** Select the **Next** button.

**Note:** When you select the **Next** button a **Confirmation** screen will display as illustrated in Figure F 70. This screen informs you that your IACS User ID has been sent to the email address on file in your IACS user account.

- If you need to go back to the previous screen to review the information you have entered, select the **Back** button.

## IACS User Guide Attachment F

- If you select the **Cancel** button, your User ID Recovery request is cancelled and all the information you entered will be lost. A screen indicating this will be displayed. You must select the **OK** button to exit that screen.

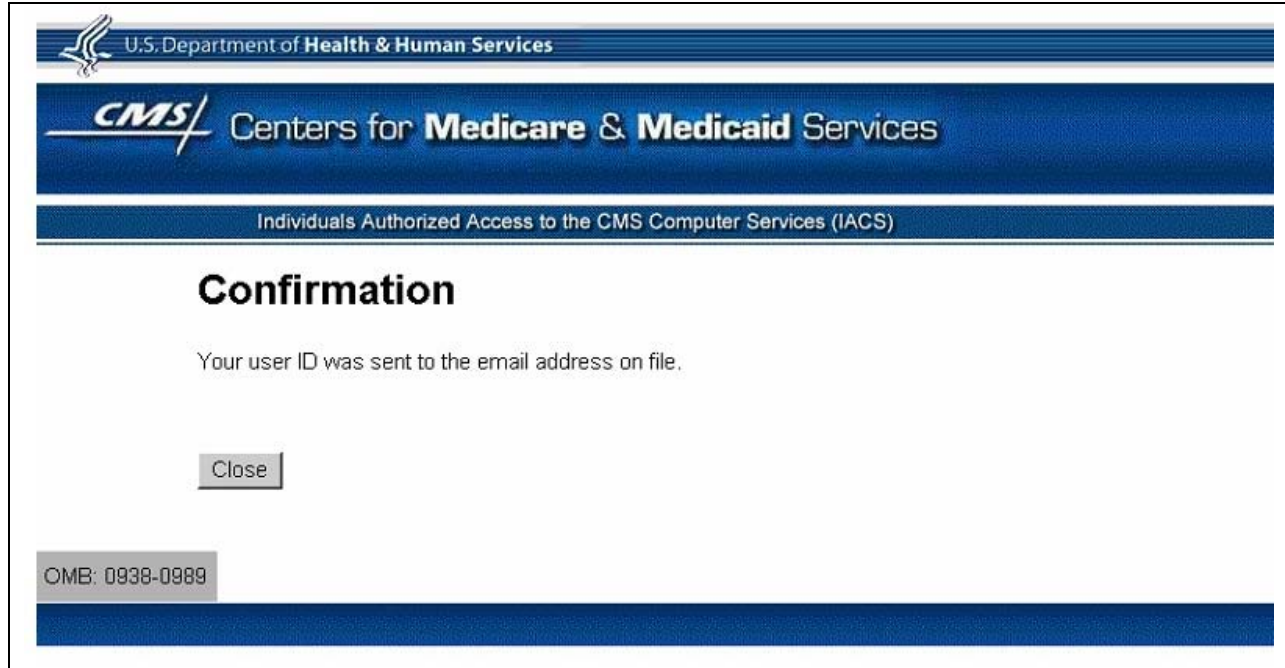


Figure F 70: User ID Recovery Confirmation Screen

**Action:** Select the **Close** button to close this browser window.

Figure F 71 illustrates an example of the email you will receive providing your IACS User ID.

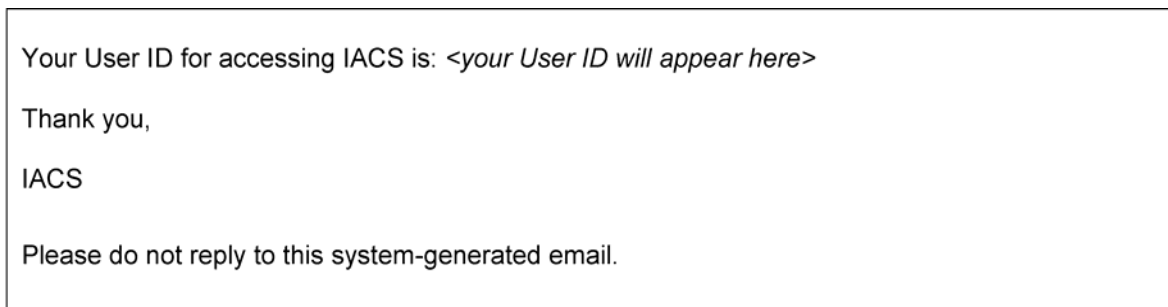


Figure F 71: Example of a User ID Email

## **F 7.0 IACS Questions and Help**

### **F 7.1 Frequently Asked Questions - FAQs**

For questions regarding the IACS system, please go to the IACS FAQ page as follows:

**Action:** Browse to: [https://www.cms.hhs.gov/IACS/17\\_FAQ.asp#TopOfPage](https://www.cms.hhs.gov/IACS/17_FAQ.asp#TopOfPage) on the CMS website.

The CMS FAQ page is another resource for questions regarding IACS. Please go to the CMS FAQ page as follows:

**Action:** Go to: <https://www.cms.hhs.gov/home/tools.asp> on the CMS website.

**Action:** Under **Site wide Tools and Resources**, select **Frequently Asked Questions**.

**Action:** Do a Search for **IACS**.

Answers to many commonly asked IACS questions can be found through this process.

If you have further questions, please call your Help Desk. For help desk contact information, see Section F 7.5 in this User Guide Attachment.

### **F 7.2 Be Proactive!**

A majority of the problems users of the IACS system face occur due to human error. Most of these problems can be avoided if greater care is exercised during the registration and approval process.

1. Please double-check information on your registration screen prior to submission.
2. If you are an approver, please double-check the access request information that your users have provided, before approving or rejecting their request.

These two quick and simple steps will help get users into the IACS system as quickly as possible.

### **F 7.3 Online Training – IACS Computer-Based Training – CBT**

IACS provides selected Computer Based Training, CBT, units to help users understand IACS processes covering the functions in IACS, including new user registration, first time login, modify account profiles, etc. This online training is provided in both accessible, 508 compliant and non-compliant versions which are updated on a regular basis.

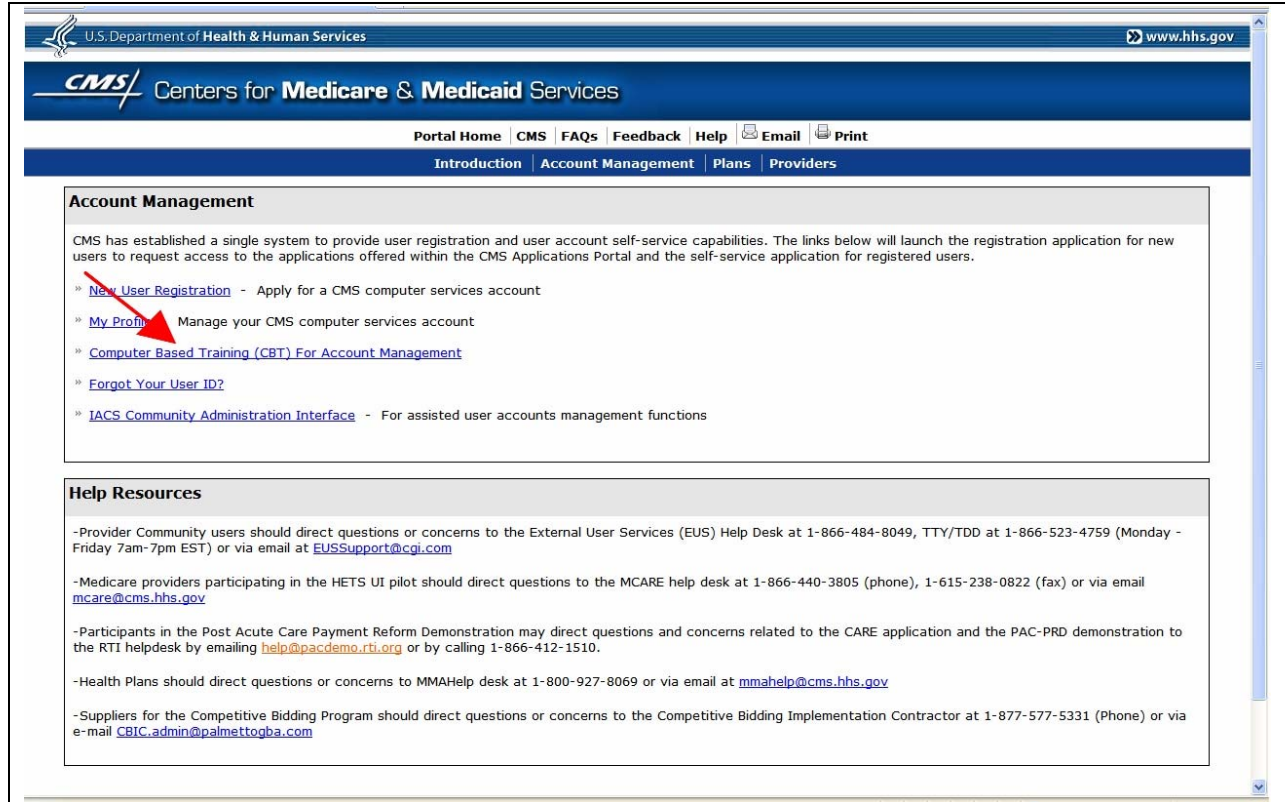
Each training unit consists of a simulated walk-through of a relevant IACS task supplemented by the IACS help documents such as this User Guide Attachment and the various Attachments, and/or Quick Reference Guides that are available online. The CBT units walk the learner thru the most common tasks and or processes that he or she will encounter.

## IACS User Guide Attachment F

There are no user tests associated with the IACS computer-based training.

To access the IACS CBT, go to the **Account Management** screen which is illustrated in Figure F 72.

**Action:** Select the **Computer Based Training (CBT) for Account Management** hyperlink.



**Figure F 72: Account Management Screen – Computer-Based Training Hyperlink**

The **IACS Computer-Based Training (CBT)** main menu screen will display as illustrated in Figure F 73.

**Note:** The IACS Computer-Based Training main menu screen is a dynamic screen which changes as and when new training is added for new or revised IACS functions. The screen you see may display more selections than the one illustrated.



## IACS User Guide Attachment F

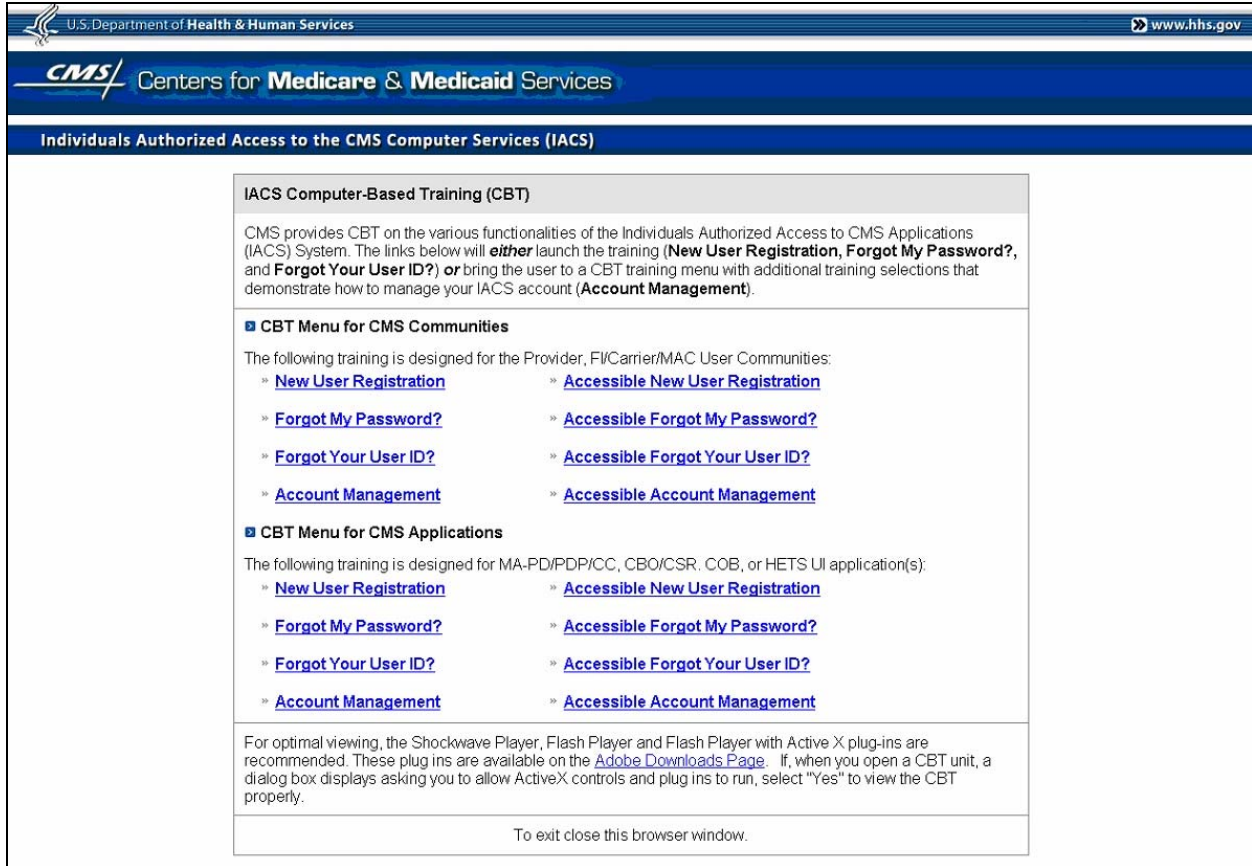


Figure F 73: IACS CBT Main Menu Screen

The menu screen has links to training for both CMS Communities and CMS Applications. Three CBT units for both areas are available *from this main menu screen*. They are:

- New User Registration – Standard and Accessible versions
- Forgot My Password? – Standard and Accessible versions
- Forgot Your User ID? – Standard and Accessible versions

In addition, selecting the **Account Management** link in both the **CMS Communities** and the **CMS Applications** sections of the menu will bring you to additional computer-based training units specific to those areas.

**Action:** Select the desired CBT unit from the main menu screen to access that CBT training unit.

**Action:** Select the **Account Management** hyperlink to access additional CBT training units.



**Note:** If you want the accessible, 508 compliant, training units, please use the hyperlinks indicated as **Accessible** in their titles.

#### **F 7.4 Prepare Your Computer**

To optimize your access to the IACS screens, please ensure that the following criteria are met:

1. **Screen Resolution:** CMS screens are designed to be viewed at a minimum screen resolution of 800 x 600.
2. **Internet Browser:** Use Internet Explorer, version 6.0 or higher.
3. **Plug Ins:** Verify that the latest version of JAVA and/or ActiveX is installed on your PC.
4. **Pop-up Blockers:** Disable pop-up blockers prior to attempting to access the CMS Applications Portal.

Contact your Help Desk if you have questions about any of the above criteria. For help desk contact information, see Section F 7.5.

#### **F 7.5 Help Desk Information**

The Help Desk associated with the Provider/Supplier Community is the External User Services (EUS) Help Desk.

1. Their **hours of operation** are: Monday-Friday 7am to 7pm Eastern Standard Time (EST).
2. Their **telephone** number is: 1-866-484-8049.
3. Their **TTY/TDD** number is: 1-866-523-4759.
4. Their **email** address is: EUSsupport@cgi.com.
5. Their **mailing** address is: Post Office Box 792750, San Antonio, Texas, 78216.

**End of IACS User Guide, Attachment F**